

WOMEN'S
RUGBY |  WORLD
RUGBY

A BLUEPRINT FOR GROWTH

WOMEN'S RUGBY FAN, DATA AND
COMMERCIAL INSIGHTS



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GUIDE TO THE REPORT

Research overview: The report is built from a range of data sources including an in-depth survey into rugby fandom surveying 4,000 rugby fans, World Rugby owned, earned and operated data analysis, women's rugby data and insights from the wider rugby ecosystem, and publicly available sports industry reports.

Key terms and definitions:

Data Analysis:

% increase or decrease: The absolute difference between two percentages – for example, going from 10% to 12% is a 2% increase, going from 25% to 15% is a 10% decrease.

Social Media:

Reach: The total number of unique users who saw a piece of content on social media.

Impressions: The number of times a piece of content is displayed on a screen, regardless of whether it was clicked.

Engagements: The total interactions (likes, comments, shares, etc.) people have with a piece of content on social media or digital platforms.

Views: The number of times video content is played or viewed online.

Followers: The number of users who have subscribed to a social media account or channel to receive updates and content.

Earned Media:

Online Mentions: The number of times a team, event, or brand is mentioned in digital media — including news articles, blogs, and social media posts.

Digital, Web & App:

Users: The number of unique individuals who visited a digital platform (website or app) over a given time period.

Sessions: The total number of visits to a website or app, including repeat visits by the same user. Reflects frequency of engagement.

Matchday Experience:

In-venue Average Experience Rating: A metric based on fan surveys capturing how attendees rated their overall live matchday experience — covering atmosphere, facilities, entertainment, value for money, and ease of access. Usually scored out of 10.

Broadcast:

Viewing Hours: The total number of hours content was watched by viewers. Calculated by multiplying the number of viewers by the duration watched.

Broadcast Audience: The number of people who watched a televised or streamed sports event.

Cumulative Broadcast Audience: The accumulation of average audiences across multiple broadcasts or matches.

Live Broadcast Viewers: The number of people who watched the event in real-time as it was broadcast, rather than via replay or on-demand.

Average Broadcast Audience: The average number of viewers at any one time during the broadcast. This metric smooths out peaks and troughs to show a typical viewing figure.

Broadcast Value: The estimated commercial value of the exposure generated through broadcasting.

Fandom:

Fans of Men's Rugby or Men's Rugby Fans: This refers to fans of men's rugby and not male fans of rugby.

Fans of Women's Rugby or Women's Rugby Fans: This refers to fans of women's rugby and not female fans of rugby.

Acquisition: The process of attracting and engaging individuals who are new to a sport, converting them into fans for the first time

Fan Survey:

World Rugby Fan Survey 2025: A survey to 4000 respondents about women's sport, women's rugby and men's rugby across Japan, South Africa, Australia, France, Canada, USA and UK

EXECUTIVE SUMMARY

01

THE UNSTOPPABLE MOMENTUM OF WOMEN'S RUGBY

ENGAGE

8.7m followers of Ilona Maher, USA Rugby and Olympian, Rugby's most followed player on social media

985% increase in social media followers for the 'Wallaroos' – Australia's national women's team

Take up space. Pitch it faster. Run harder. Put another plate on the bar and never tone it down.

Ilona Maher, USA Rugby Player, Olympian, ESPY Award Winner

WATCH

17.6m cumulative broadcast audience for Women's Rugby World Cup 2021, played in 2022 (New Zealand)

15.4m fans tuning in to watch the Guinness Women's Six Nations 2025 (regional tournament, Europe)



GO

260,000 people watching Women's Rugby 7s – Paris 2024 Olympic Games

380,000 projected attendance at Women's Rugby World Cup 2025 (England)



INTRODUCTION

Women's rugby stands on the brink of something extraordinary. Powered by world-class athletes and a passionate, growing fanbase, the sport is rapidly evolving from a niche, developing discipline to a global force. With upcoming Women's Rugby World Cups in 2025 (England) 2029 (Australia) and 2033 (USA), it represents one of the most dynamic opportunities in global sport.

This momentum is real – but unlocking its full potential requires strategic focus, sustained investment, and collective commitment. A younger, diverse audience is reshaping the game, driving commercial value, and demanding authentic fan experiences. These fans are not just watching – they're deeply engaged and influencing the sport's future in ways that set it apart from the men's game.

This audience and commercial impact report provides a timely resource, based on a multi-market study conducted over seven months, offering a comprehensive view of trends, audience insights, and commercial dynamics shaping the game today. It focuses on the broader ecosystem and the long-term strategy needed to capitalise on the sport's rapid growth.

To fully realise this opportunity, one thing is clear: collaboration is essential. World Rugby's Blueprint for Growth relies on alignment between stakeholders – unions, commercial partners, broadcasters, and most importantly, players and fans.

This report is a foundation for that work. A tool to inform, challenge and guide the next phase of progress. The time is now – let's move forwards together.



Sally Horrox

Chief of Women's Rugby
World Rugby

THE WOMEN'S RUGBY FANBASE IS GROWING AND GROWING FAST

55%

Interest is booming:

55% of women's rugby fans believe their interest in rugby union will grow in the future.

Giving these fans more opportunities to watch and attend is key to long term commercial viability

53%

Most common first touchpoint is TV and online streaming:

53% of women's rugby fans discovered the sport through TV or streaming. Broadcast and streaming are critical acquisition tools

49%

New wave of fans:

49% of women's rugby fans have become fans in the last two years. This is the new wave of fandom
(vs 22% of men's rugby fans)

31%

Big moments = big conversions:

31% of women's rugby fans are motivated to follow by their interest in major tournaments. Big moments are an acquisition tool. Social media makes the conversations even more accessible



THE WOMEN'S RUGBY FANBASE IS YOUNG AND PLAYER FOCUSED



48%

Men's rugby is a launchpad for women's rugby:

48% of fans of women's rugby start off as fans of men's rugby only first.

41%

Club agnostic:

41% of women's rugby fans do not support a club, but those that do are just as likely to support multiple clubs than just one club

29%

Younger and more female:

29% of women's rugby fans are under 35 and 43% are female. This is +4% under 35 (29% vs 25%) and +4% female (43% vs 39%) than men's rugby fans

+10%

All about the players:

10% more women's rugby fans prefer women's rugby because they find the players, personalities and stories more interesting vs men's rugby fans

STRATEGIC PILLARS TO UNLOCK THE NEXT PHASE OF GROWTH FOR WOMEN'S RUGBY

Visibility drives interest

73%

of women's rugby fans agree that brands have an authentic role in boosting visibility of women's rugby

47%

of fans cite media coverage as a key driver of interest (vs 39% for men's)

39%

of women's rugby fans said that increased visibility of players has driven increased engagement in women's rugby

Major international tournaments bring new fans to the game

133%

projected total attendance growth from Women's Rugby World Cup 2021, played in 2022, to Women's Rugby World Cup 2025

31%

of women's rugby fans are motivated to follow the sport based off their interest in major tournaments and high-profile events

Fans are willing to spend with brands who invest

73%

of women's rugby fans agree that brands have an authentic role to play in boosting visibility of women's rugby

42%

of women's rugby fans are more likely to talk about a brand that sponsors women's rugby (9% more than men's rugby fans)

Participation fuels fandom

31%

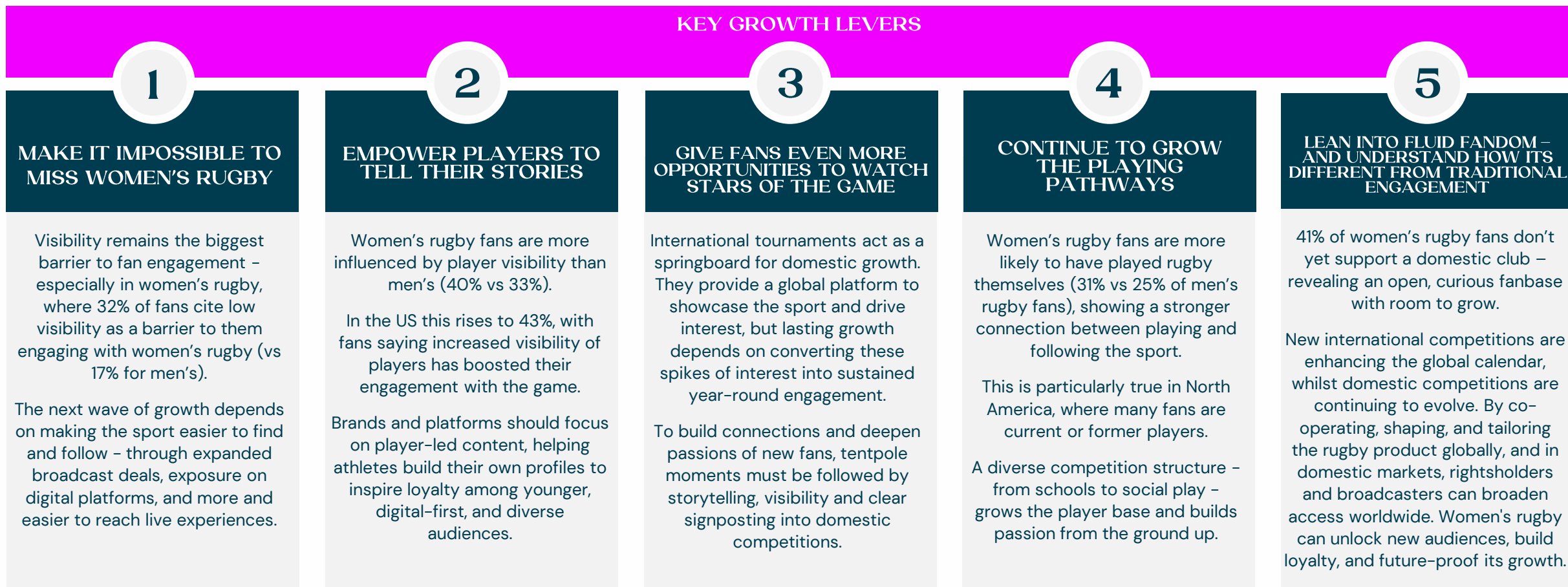
Women's rugby fans are more likely to have played rugby themselves than men's rugby fans (31% vs 25%)



THE BLUEPRINT FOR GROWTH

To fully unlock the commercial potential of women's rugby, collaboration is essential – between World Rugby, unions, sponsors, broadcasters, and players. A coordinated, long-term approach is needed, **with everyone working toward the same goal: building visibility.**

A recent study from Parity found that nearly half of Gen Z and Millennial sport watchers are more likely to purchase from a brand that sponsors a woman athlete (46%) or team (46%). Brands looking to engage younger audiences should lean into partnerships with women athletes, invest to drive growth, and put these women at the centre of their commercial strategies, campaigns and activations¹.



GLOBAL COMPETITIONS: LANDSCAPE AND INSIGHTS

02

SECTION HIGHLIGHTS

Competitions are powering growth and breaking new ground

Women's rugby competitions are not just keeping pace with the sport's rapid growth – they're powering it. From global tournaments to domestic leagues, these events are breaking new ground, setting record highs in attendance, viewership, and engagement. They are creating opportunities for the world's best players to redefine what's possible in women's elite rugby. For fans, broadcasters, and sponsors, this momentum is more than a trend – it presents a rare chance to invest in a sport that is reshaping global conversations around excellence, equity, and entertainment on the world stage.

Recent highlights include:

- The Rugby World Cup 2021 (played in 2022) shattered previous records, with 150,000 fans attending, attracting more than 9 million viewers globally
- The HSBC SVNS in 2024 marked unprecedented growth in global broadcast reach and fan attendance across this gender equal Series
- WXV launched in 2023 with 18 top unions competing in 27 test matches, with more coverage in more markets than ever before
- The Paris 2024 Olympic Games set a global one-day attendance record of over 120,000, while a global broadcast audience brought stars into millions of new homes and devices
- The Guinness Women's Six Nations continues to break records annually, with sold out fixtures and the 2024 edition drawing record TV audiences
- Premiership Women's Rugby (PWR) has grown in competitiveness and visibility, becoming a vital proving ground for top-tier talent



WORLD RUGBY ECOSYSTEM



6

Regional Associations



133

Member Unions



7.3m

Total playing numbers globally



38%

Female representation on
World Rugby Council



42%

Female representation on
World Rugby Executive Board



36m

Social media followers across
World Rugby Social Channels
(June 2025)



£6.7b

In Value to Society
based on a range of health,
social and economic factors



£1.2b

Healthcare Saving
helping to reduce breast
cancer, child obesity, heart
disease and mental illness



2016

7's included in 2016 Rio
Olympics. IOC International
Federation

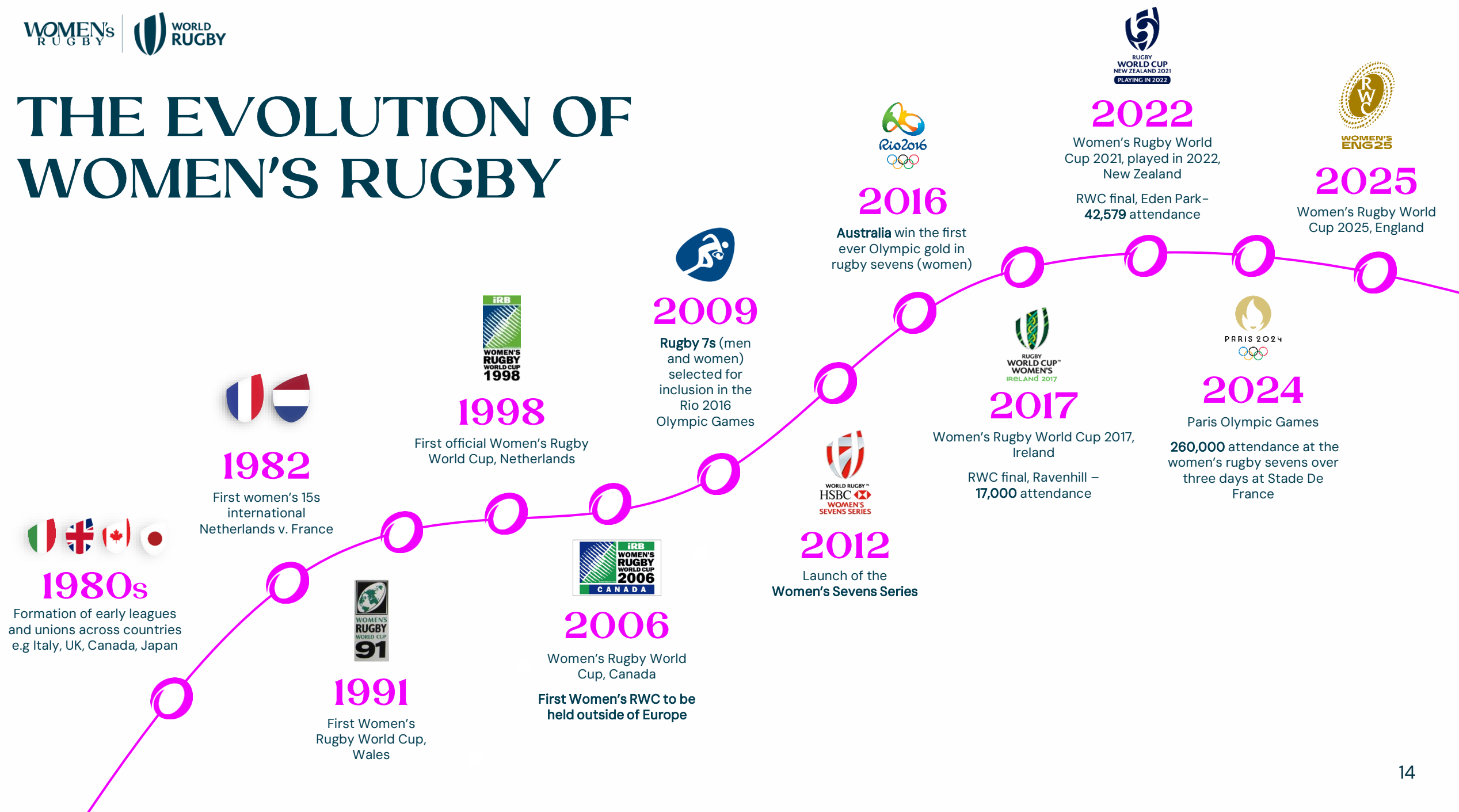


25

World Rugby
Commercial Partners



THE EVOLUTION OF WOMEN'S RUGBY



MAJOR TOURNAMENTS – HOSTS AND WINNERS

Women's Rugby World Cup 10 editions of the tournament from 1991 to 2025



Olympics – Women's Rugby Sevens



World Rugby Women's Rankings



Click here for
the latest World
Rugby Women's
Rugby Rankings



A GENERATIONAL MOMENT IN THE MAKING

Women's Rugby World Cup 2025

Rugby World Cup 2025 is already eclipsing previous records and will set a new benchmark for the women's game.

This tournament is set to be an era-defining moment that will accelerate the growth of women's rugby and help us to realise its full, future, commercial potential.

16

TEAMS

MORE THAN EVER BEFORE

736

PLAYERS & TEAM STAFF

LARGEST SQUADS EVER

32

MATCHES

FULL OF EXCITEMENT

6

REGIONS

REPRESENTED – A TRULY GLOBAL TOURNAMENT

8

VENUES

ACROSS ENGLAND

6

WEEKENDS

22 AUGUST – 27 SEPTEMBER



WOMEN'S ENG25

Ambitious Targets

...already delivering

400k

TOTAL ATTENDANCE¹
(+166% VS RWC 2021)²

330k

TICKETS SOLD (AUGUST 2025)³
(+52% VS RWC 2021)⁴

50m

TOTAL GLOBAL VIEWING HOURS¹
(+47% VS RWC 2021²)

76%

FANS PREDICT INCREASED
ENGAGEMENT WITH RUGBY
FOLLOWING RWC 2025⁵

750m

SOCIAL IMPRESSIONS (OWNED AND
OPERATED)¹ (+352% VS RWC 2021²)

20+

COMMERCIAL PARTNERS

2m

AVERAGE MONTHLY DIGITAL
USERS DURING THE
TOURNAMENT¹
(+81% VS RWC 2021²)

72

COUNTRIES APPLIED FOR
TICKETS³



THE COMPETITION LANDSCAPE

International



Regional



Domestic



THE DAWN OF A NEW ERA

Women's Rugby World Cup 2021, played in 2022

The Women's Rugby World Cup drives peak audience, revenue and visibility for women's rugby on a quadrennial basis.

The success of the Women's Rugby World Cup 2021, played in 2022, was a testament to the sport's resilience, overcoming significant challenges to break records and set new standards.

Despite a one-year delay due to COVID-19 and time zone hurdles impacting engagement in wider global key markets, the tournament – hosted in New Zealand – drew record-breaking crowds and expanded the global fanbase.



RECORD BREAKING
TOURNAMENT
ATTENDANCE

150k

+434% v 2017

CHANGING AUDIENCES AT
RUGBY FIXTURES

59%

FEMALE TICKET PURCHASERS

STANDALONE WOMEN'S
MATCH ATTENDANCE RECORD

42.5k

ATTENDANCE AT THE FINAL

RECORD BREAKING
SOCIAL VIEWS

166m

+269% v 2017

WOMEN'S RUGBY GOING
VIRAL ON SOCIAL

25m

VIEWS ON TOP PERFORMING POST,
BLACK FERNS HAKA VIDEO

STRONG BROADCAST
AUDIENCE

17.6m

BROADCAST AUDIENCE



A GLOBAL CELEBRATION OF RUGBY 7s

HSBC SVNS

HSBC SVNS is a dynamic, high energy, fan-driven competition, capturing global attention. With a gender equal format, it showcases the best women's and men's Rugby 7s athletes in the world. The promotion and relegation format adds an element of jeopardy, fuelling excitement and generating 14,000 media mentions across major publications in 2024. Inclusion into the Olympic Games programme in 2016 has helped to attract increased investment, broaden the sports appeal and expand audience reach.

Across the 2023/24 season...

ATTENDANCE

451k

HONG KONG HIGHEST
SINGLE EVENT AT 97K

FEMALE
TICKET PURCHASERS

38%

V 20% AVERAGE FOR ALL
OTHER WORLD RUGBY EVENTS

IN VENUE
EXPERIENCE RATING

8.1

PERTH HAD THE HIGHEST
AVERAGE RATING OF 8.6

GLOBAL BROADCAST
VIEWING HOURS

22m

RIISING TO 35.4m IN 2024/25

WEB & APP USERS
SINCE LAUNCH

3m

+19% MORE WEB SESSIONS VS
SAME EVENTS IN 2022/23 SERIES

SOCIAL MEDIA
VIDEO VIEWS

1.5b

+630% GROWTH ON 2022/23

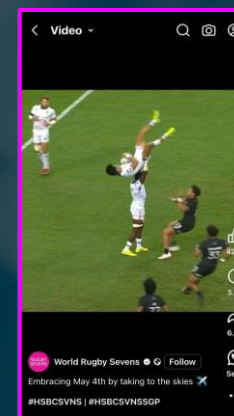
SOCIAL MEDIA SUCCESS



+32%

GROWTH IN SOCIAL MEDIA
FOLLOWERS IN 2023/24

TOP PERFORMING SOCIAL POSTS

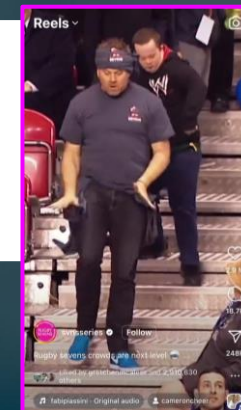


162m
VIEWS

435k
ENGAGEMENTS

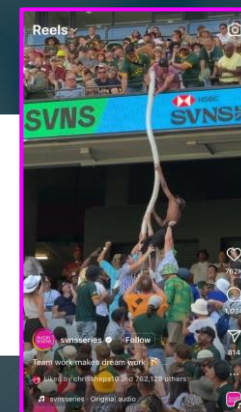
39m
VIEWS

3.2m
ENGAGEMENTS



36m
VIEWS

776k
ENGAGEMENTS



The most successful content focused on the light-hearted and entertaining side of HSBC SVNS, resonating with fans worldwide. Behind-the-scenes training footage and unique POV gameplay experiences were among the most engaging themes.

INCREASING COMPETITIVENESS, REACH, AND IMPACT OF WOMEN'S RUGBY

WXV Tournament

Launched and played in 2023 and 2024 to help raise standards and accelerate the development of elite women's rugby, WXV, provided a structured pathway to qualification for RWC 2025 and more competition than ever before for 18 participating unions.



WXV unlocked new storytelling opportunities, particularly around the road to RWC 2025. While early results were mixed, interest surged in key markets such as the USA, alongside a rise in online mentions, signaling increased global attention.

Social engagement during WXV 2023 was notably lower due to its overlap with the Men's Rugby World Cup 2023, however the global attention generated by the men's tournament served as a valuable entry point for new audiences, encouraging broader interaction with WXV content in 2024.



IN 2024...

SOCIAL MEDIA IMPRESSIONS

53m

+310% v 2023¹

BROADCAST HOURS VIEWED

2.2m

TF1 (FRANCE) HAD THE HIGHEST TOTAL VIEWING HOURS AT 795K¹

SOCIAL MEDIA ENGAGEMENTS

1.8m

+480% v 2023¹

ONLINE MENTIONS

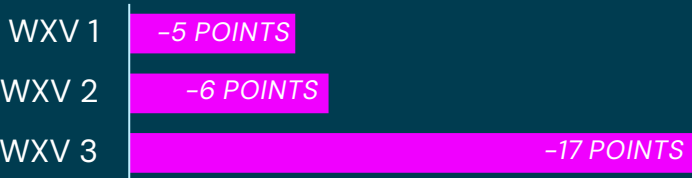
30k

+76% v 2023¹

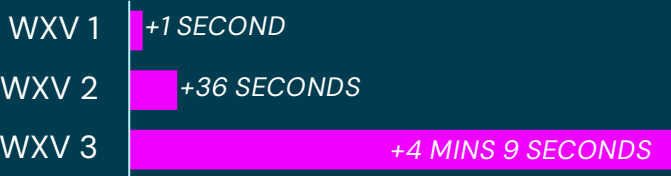
WXV DIRECTLY IMPACTED THE ON-PITCH PRODUCT

WXV provided the opportunity for 18 participating teams to play more competitive rugby and has driven up performance standards as a result.

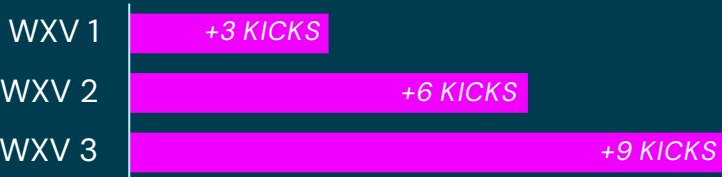
Decreasing winning margins
2023 vs 2024 average score margin²



Increasing ball in play
2023 vs 2024 average time ball is in play²



Increasing technical skills e.g., kicks per game
2023 vs 2024 average kicks per game²



INCREASING REACH, ENGAGEMENT AND REVENUE POTENTIAL

Guinness Women's Six Nations

In 2022, Six Nations Rugby took the innovative decision to move the W6N from outside the M6N Championship window to give the tournament its own standalone space in the rugby calendar.

This change has transformed the W6Ns ability to engage with audiences, broadcasters, commercial partners and allow it to continue to grow its profile and reach. With the women's rugby global calendar evolving in 2026, the W6N will evolve again, continuing to have its own standalone window alongside other international and domestic competitions.

Six Nations Rugby's wider approach has also seen the introduction of age-grade and development competitions and platforms to strengthen the women's rugby pathway, including the Six Nations U18 Women's Festivals and U20 Women's Summer Series.



2025 Attendance

15.5m
CUMULATIVE MATCH
DAY TOURNAMENT
ATTENDANCE

21,186
NEW WOMEN'S
ATTENDANCE RECORD
FOR WELSH RUGBY
UNION
WALES V ENGLAND,
PRINCIPALITY STADIUM

2025 Broadcast

18.2m
2025 GLOBAL BROADCAST
AUDIENCE VIEWERS
(+8% VS 2024)

2025 Digital Engagement

173.8m
IMPRESSIONS

125.8m
VIDEO VIEWS

3.9m
ENGAGEMENTS

BRINGING IN A NEW WAVE OF YOUNG FANS BY INCREASING VISIBILITY

Premiership Women's Rugby

Women's domestic rugby in England is evolving fast, with rising professionalism and increasing visibility. As one of the most prominent domestic leagues globally, Premiership Women's Rugby (PWR) is now leading the charge – drawing in a growing wave of younger fans and reshaping the sport's future.



And with a new long-term deal announced with TNT Sports through to the end of the 2028-2029 season



Broadcast Audiences On The Rise¹

+36%

THE 2025 PWR FINAL AVERAGE AUDIENCE INCREASE VS 2024 FINAL

+86%

YEAR-ON-YEAR INCREASE OF SEASON AVERAGE AUDIENCES ON TNT SPORTS

Matchday Audiences On The Rise²

+24%

INCREASE IN ATTENDANCES FROM 2024

9,238

BRISTOL BEARS VS GLOUCESTER-HARTPURY AT ASHTON GATE, ILONA MAHER'S DEBUT MATCH

Young Fanbase³

+17%

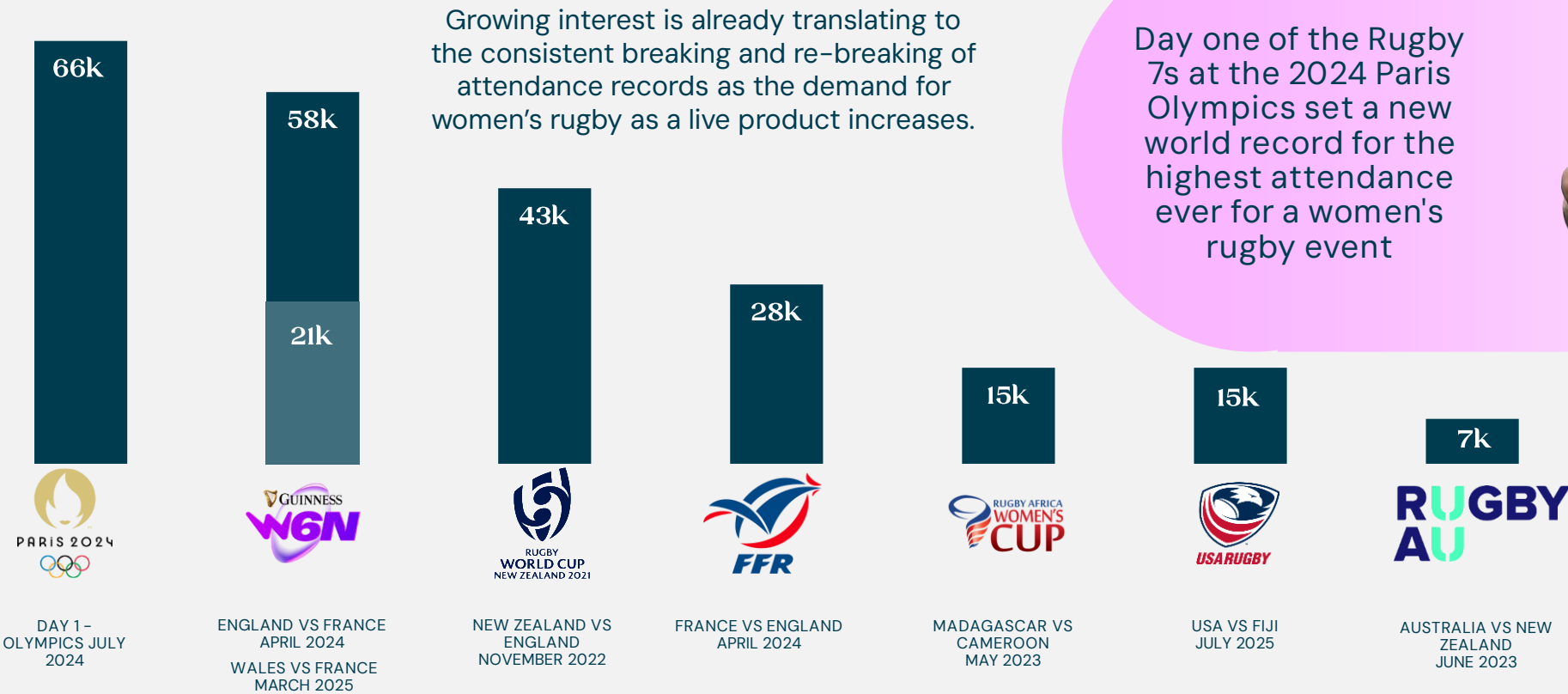
OF 18-24S ARE INTERESTED IN PWR, WITH PWR FANS YOUNGER THAN ALL OTHER RUGBY COMPETITIONS SURVEYED

21%

OF 18-34S FOLLOW PWR BECAUSE THEY LIKE AND FOLLOW SPECIFIC PLAYERS, THE HIGHEST PERCENT AMONGST ALL AGE GROUPS

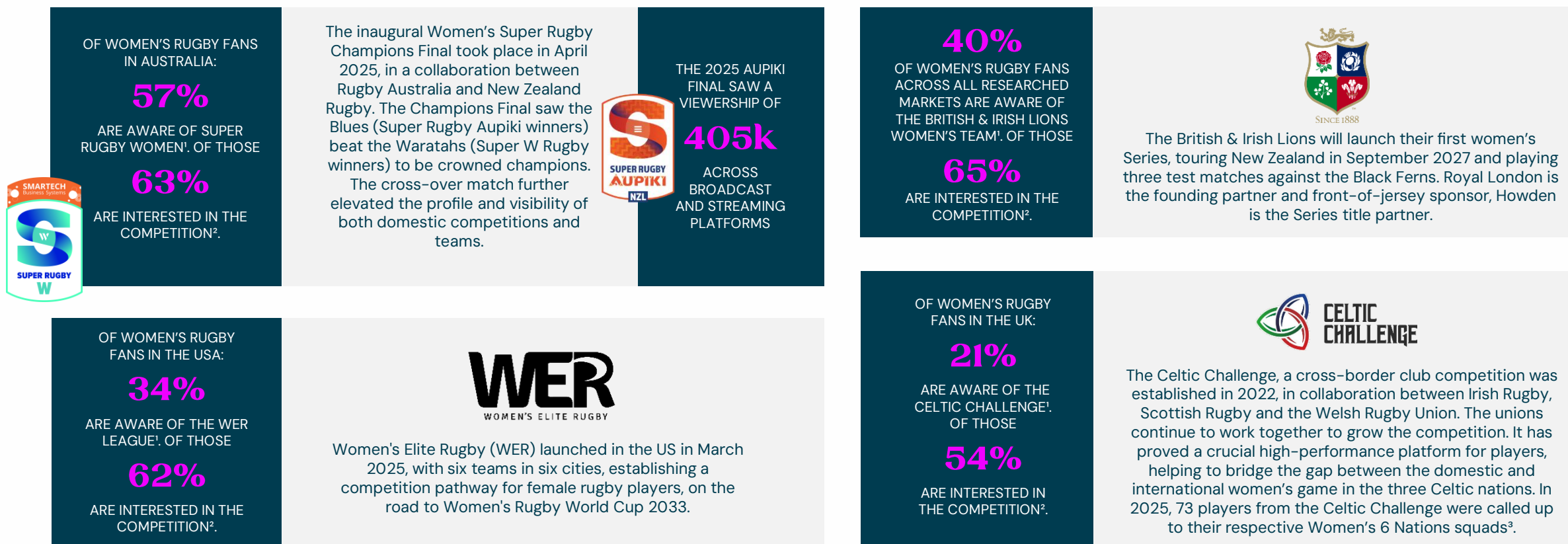
GLOBAL ATTENDANCES HAVE CONTINUED TO BREAK RECORDS

Since RWC 2021



THE COMPETITION LANDSCAPE ACROSS THE GLOBE IS GROWING TOO

The opportunity for women to play regular competitive high-performance rugby is crucial for the future success of the sport. The launch of new competitions in response to this signals a shift toward greater professionalism, visibility, and commercial ambition. These competitions provide crucial high-performance environments for elite players, expanding pathways from grassroots to the international stage, and provide an outlet for women's rugby fans to build habitual consumption of the sport, beyond the existing major tournaments.



WOMEN'S RUGBY FANDOM: RISING FANDOM

03

SECTION HIGHLIGHTS

The momentum behind women's rugby is **undeniable** – and accelerating fast:

- Women's Rugby represents the biggest opportunity to acquire and convert a new, addressable fanbase
- **65%** of women's rugby fans have increased their engagement over the past four years – significantly outpacing growth in men's rugby
- Nearly half of all current fans have discovered the women's game within the last two years, underlining a rapid and recent shift in audience behaviour
- Engagement spans live match attendance, social media activity, broadcast viewership, and merchandise support – showing the depth and breadth of fan connection

With a rapidly expanding audience, women's rugby presents a significant opportunity to attract and convert new fans – particularly among younger, digitally engaged demographics, by celebrating diversity, purpose and fostering authentic connections between players and fans.



WOMEN'S RUGBY FANDOM IS GROWING RAPIDLY

The momentum behind women's rugby is unmistakable. 65% of women's rugby fans have increased their engagement over the last four years, significantly outpacing men's rugby. Major tournaments are drawing record audiences highlighting a rapidly growing appetite for the women's game.



65%

Of fans of women's rugby have increased their engagement with women's rugby over the last 4 years (vs 48% for men's rugby)

When asked how their engagement with rugby union has changed over the last four years



72%

of South African fans



69%

of French fans



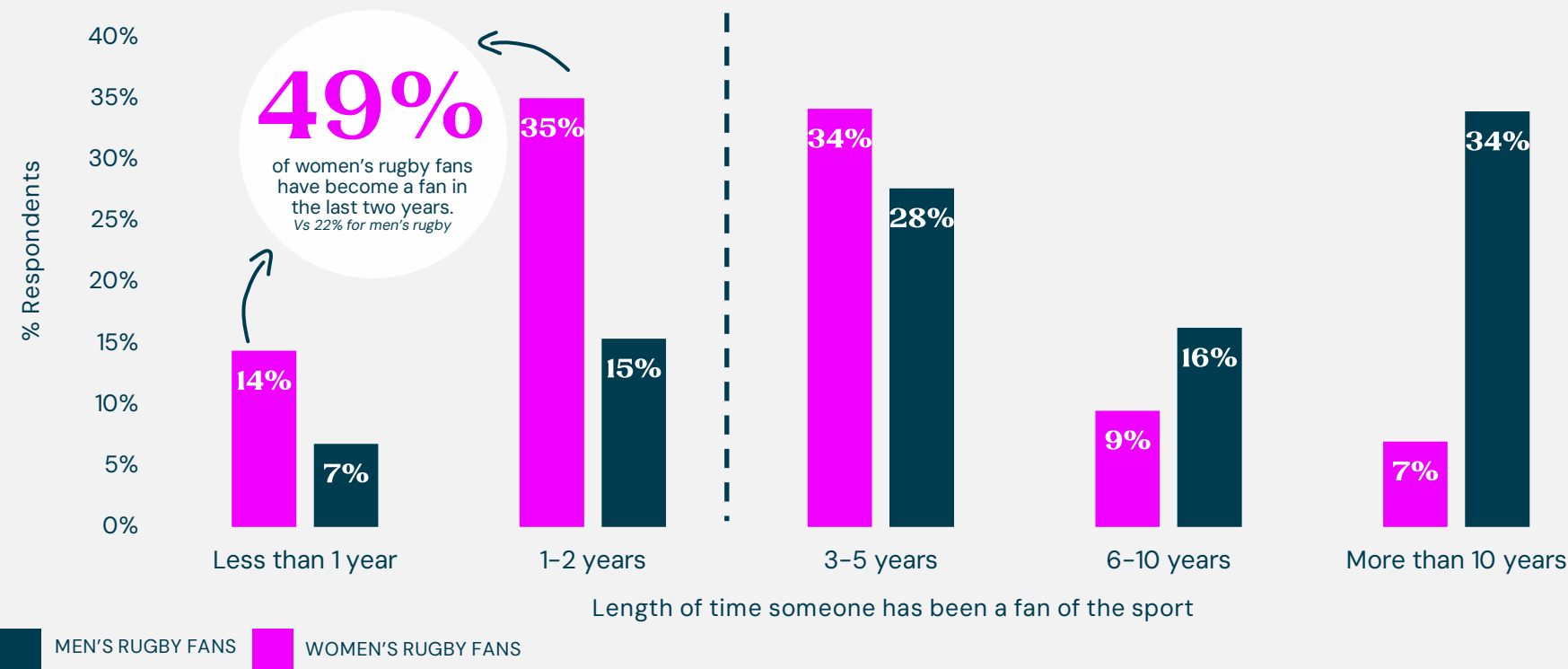
69%

of American fans

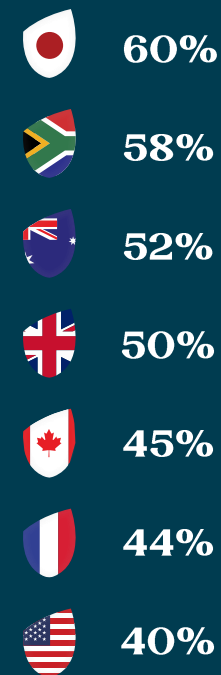
said they've increased their engagement with the women's game

ALMOST HALF OF FANS BECAME FANS IN THE LAST 1-2 YEARS

Half of all women's rugby fans have become fans of the sport within the past two years, while the fans of the men's game are more likely to have originated earlier. Japan and South Africa have the largest emerging fanbase in the women's game. South Africa boasts long-held fandom in men's rugby, which is now starting to convert across into the women's game. New fans and emerging markets signals an opportunity for brands, broadcasters, and rightsholders to connect with new audiences.



% of women's rugby fans per market who have become fans within the last two years:



WOMEN'S RUGBY FANDOM: FAN DEMOGRAPHIC PROFILE

SECTION HIGHLIGHTS

Women's rugby is redefining the matchday experience and attracting a new generation of fans. With a family-friendly atmosphere, inclusive values, and rising visibility of player personalities, the game is becoming increasingly relevant to modern, diverse audiences.

A Fan Base That Reflects the Future

- Women's rugby fans are younger, more gender balanced, and more family-oriented compared to traditional men's rugby audiences
- The inclusive and welcoming environment, especially on matchdays, makes women's rugby a natural fit for families and younger spectators

Personalities Drive Engagement

- Fans of the women's game are more invested in individual players and their stories than fans of men's rugby, underscoring **the power of authentic athlete-driven narratives**
- This human connection is a powerful tool for deepening loyalty and engagement, particularly across digital platforms

Part of a Bigger Movement

- **Women's rugby fans reflect broader trends across women's sport**, aligning it strongly with the global shift toward more equitable, progressive, and fan-centric sporting experiences
- The game's appeal is not in isolation – it's part of a wider cultural moment driving change across the sporting landscape

Men's Rugby as a Gateway

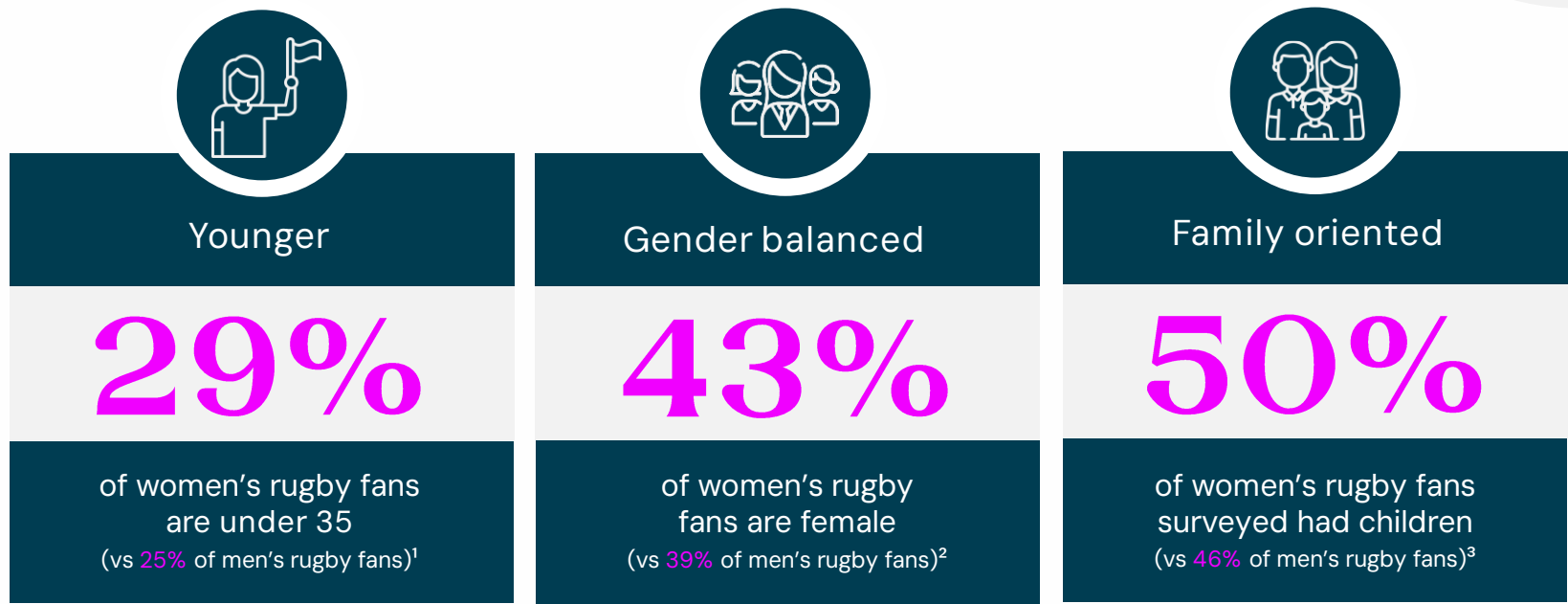
- Nearly **50%** of women's rugby fans say their journey started with men's rugby – highlighting strong cross-code potential and opportunities for conversion and retention

Why This Matters

- Brands have **a unique opportunity to build long-term, high-value relationships with fans** from an earlier age by engaging with women's rugby now
- This evolving fan profile makes the women's game a strategic entry point into broader communities that value authenticity, diversity, and connection

UNDERSTANDING WOMEN'S RUGBY FANS: WHO ARE THEY?

Women's rugby is expanding reach to diverse audiences – drawing in even younger and more female audiences. Through a family-friendly product and greater appeal to children, especially on matchdays, the women's game is becoming more relevant to modern audiences. This shift offers brands a unique opportunity to build long-term, high-value relationships with fans from an earlier age.



Sources: (1) GWI 2025 Women's Rugby Fan Survey Q: How old are you? (2) Q:Which of these options best describes your gender? (3) Are you a parent or guardian of any child under the age of 18 (4) RWC21 Fan Experience Report

WOMEN'S RUGBY FANS MIRROR WIDER WOMEN'S SPORT AUDIENCE TRENDS



Younger

73%

of women's sports fans are 18 to 44 compared with 62% of men's sports fans¹



Gender balanced

43%

of women's sports fans are female, (vs **43%** of fans of women's rugby) providing a far more balanced demographic compared to men's sports²



Family oriented

48%

of Women's EURO 2022 ticket holders attended matches as part of a family³

41%

of Tickets bought for The Hundred in 2022 were families⁴



ACROSS ALL MARKETS, ALMOST HALF OF WOMEN'S RUGBY FANS BEGAN THEIR JOURNEY AS FANS OF THE MEN'S GAME

Men's rugby is the low hanging fruit to grow fandom of women's rugby

48%

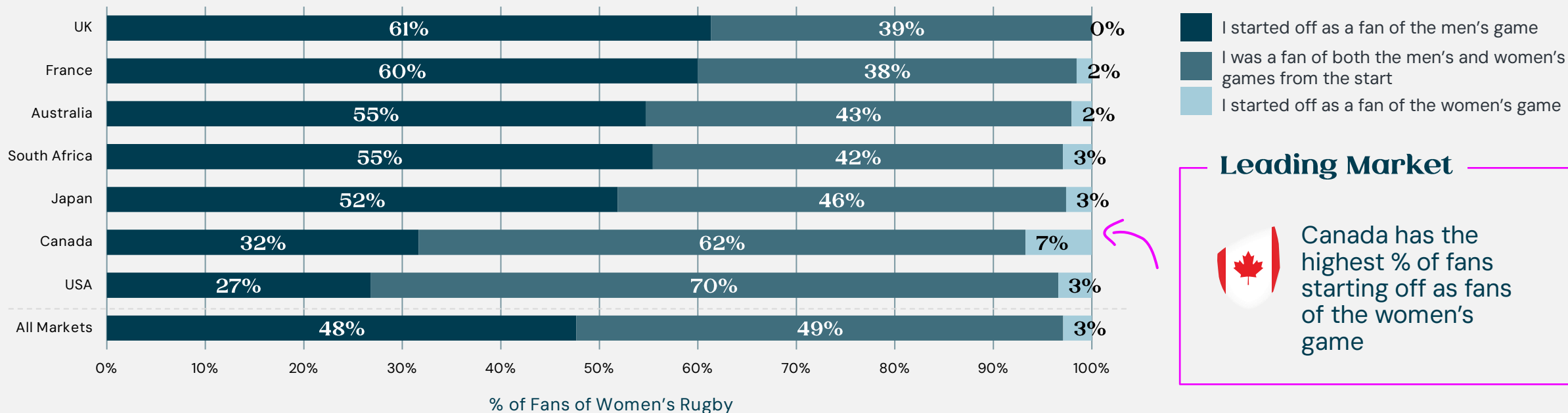
of women's rugby fans began their journey as fans of the men's game, with this trend especially strong in traditional rugby markets such as the UK and France.

But in wider emerging markets, fans are becoming fans of rugby regardless of gender

In less-established rugby markets, such as the USA and Canada, **40%** and **33%** respectively more women's rugby fans were either fans of both men's and women's rugby from the outset or entered the sport directly through the women's game.

The opportunity

An increasing number of fans now follow both the men's and women's game from the start – creating a powerful opportunity to grow the overall rugby audience. In emerging markets especially, the women's game is not riding on the coattails of the men's; it's becoming a meaningful entry point in its own right.



Leading Market



Canada has the highest % of fans starting off as fans of the women's game

WOMEN'S RUGBY FANDOM: EXPLORING FAN ORIGINATION

03

SECTION HIGHLIGHTS

Women's rugby is winning new fans through major events, elevated visibility, and inclusive participation pathways. As the sport continues to grow, understanding what drives fandom is key to unlocking long-term, sustainable audience growth.

Major Events Spark New Interest

- 31% of women's rugby fans say they were motivated to follow the sport because of major international tournaments and high-profile events
- 70% of spectators at RWC 2021 had never attended a women's rugby match previously
- These moments serve as catalysts for engagement, driving awareness and emotional connection at scale

Visibility Fuels Fandom

- For 50% of women's rugby fans, increased broadcast and digital visibility was their entry point into the sport
- Strategic investment in media coverage and storytelling remains critical to converting viewers into lifelong fans

Experience Matters

- Women's rugby fans, like fans across women's sport more broadly, place high value on the matchday experience and a welcoming, inclusive environment
- Fans are motivated not just by what happens on the field, but by the chance to celebrate women athletes and be part of a movement

Participation Is the Next Frontier

- Creating and expanding participation pathways is essential to long-term growth
- More access to play means more opportunity to inspire players, families, and future fans, turning grassroots engagement into lifelong support

Why This Matters

- Fandom in women's rugby is not just emerging– it's purpose-driven and emotionally invested
- By continuing to elevate major events, increase visibility, and support participation, the sport can build a powerful ecosystem where fans, players, and communities grow together

MAJOR INTERNATIONAL TOURNAMENTS ARE A CRUCIAL ENTRY POINT FOR NEW FANS

Major tournaments boost global interest and visibility for women's rugby, where domestic leagues sometimes struggle for consistent visibility. These events amplify media coverage, attract new audiences, and drive systemic change including inspiring participation.

31% of women's rugby fans are motivated to follow the sport based off their interest in major tournaments and high-profile events¹

Top Markets Motivated by Major Events¹

40%



FRANCE

36%



UK

33%



USA

WOMEN' SPORTS MAJOR EVENTS

Great experiences drive fan retention - especially among new fans:

70%

of spectators at Women's Rugby World Cup 2021 had never attended a women's rugby game²

40%

of spectators were watching their first live women's football match, with **29%** experiencing their first international game at Women's EURO 2022³

57%

of viewers of The Hundred hadn't watched any other live ECB cricket in 2021⁴

Great experiences drive retention



95%

of RWC 2021 spectators increased their likelihood of attending a women's rugby event²

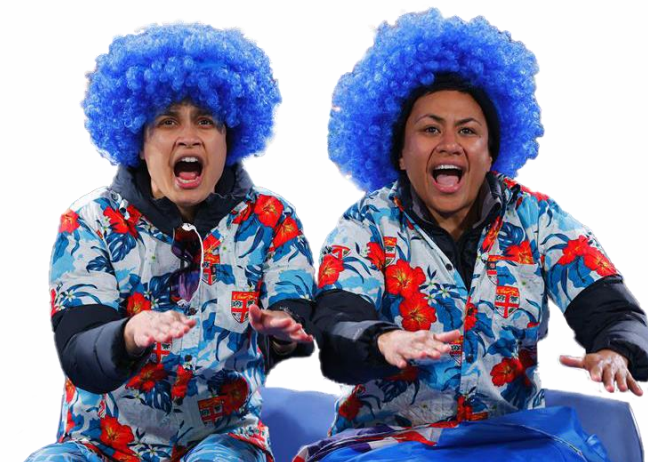


16

Consecutive sellouts for the Matilda's at home following the 2023 FIFA Women's World Cup⁵

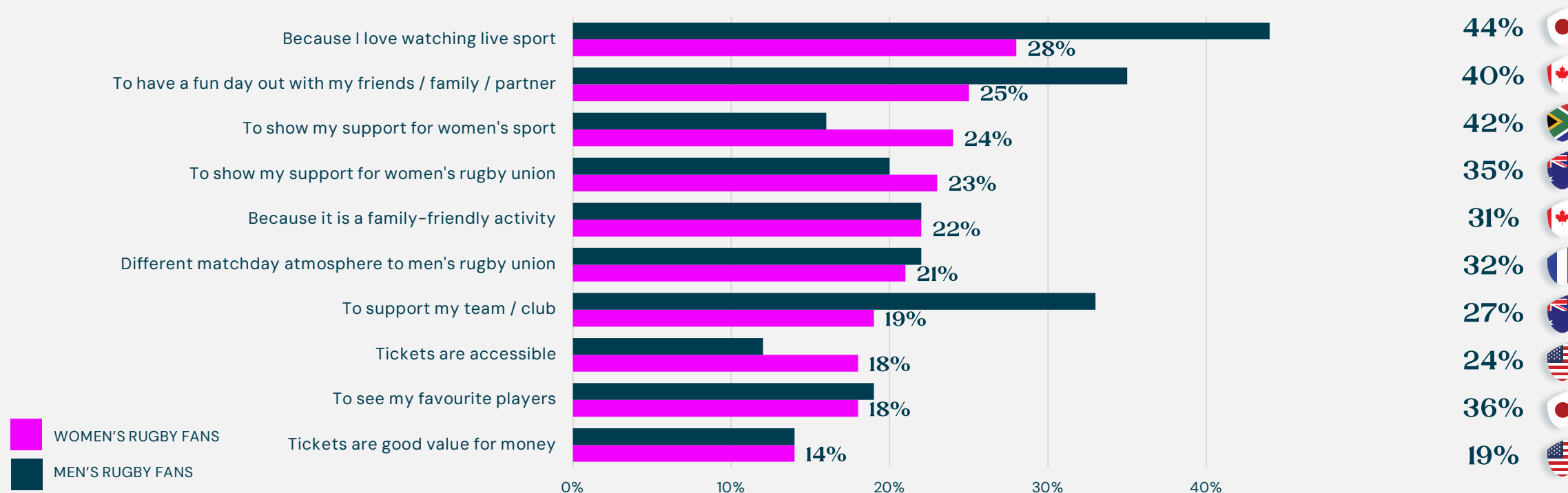
A GREAT GAME DAY EXPERIENCE, NOT PRICE, IS A KEY MOTIVATOR FOR FANS OF WOMEN'S RUGBY

Women's rugby fans attend matches for a broader range of reasons than men's rugby fans. While men's fans are primarily driven by the love of live sport, fun days out, and team loyalty, women's fans show a more diverse set of motivations – including support for women's sport, a unique matchday experience, family-friendliness, and values-led reasons like supporting women's rugby union.



Reason for attending rugby union matches

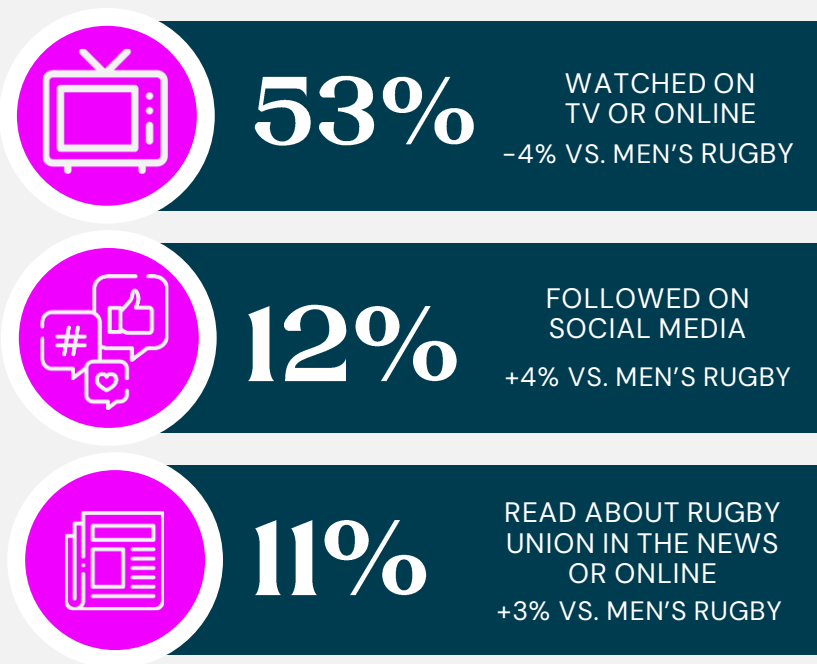
Top market for reason for attending (%)



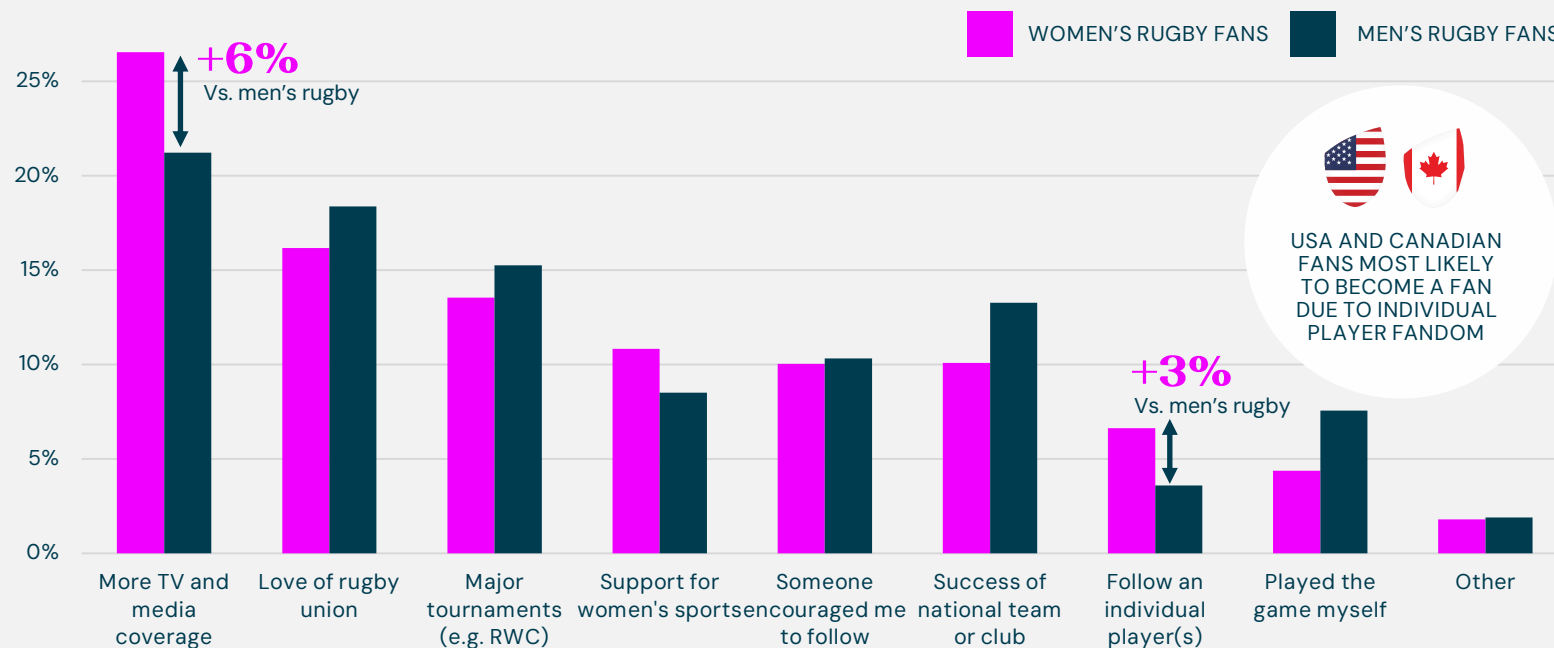
WHEN WOMEN'S RUGBY IS EASY TO FIND, IT'S EASY TO LOVE

Over half of women's rugby union fans discovered the sport through TV or online coverage, with 27% drawn in by increased media visibility. Social media also plays a much bigger role in attracting new fans than it does in men's rugby, with this being the second most common channel that people have their first experience with women's rugby. This will only continue as the profile of star players within the women's game also continues to grow.

Top 3 channels (touchpoints) that fans had their first experience of women's rugby¹

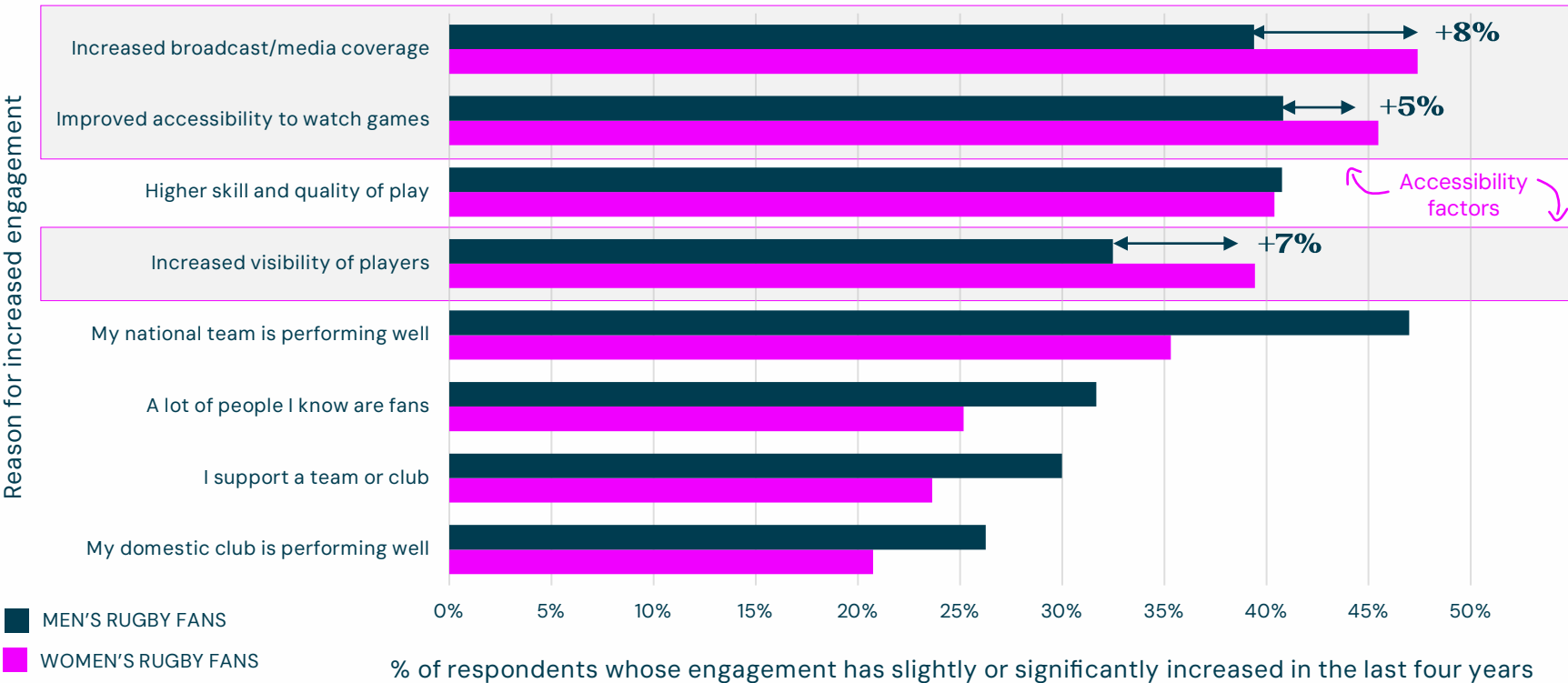


Main reason fans became fans of rugby union²



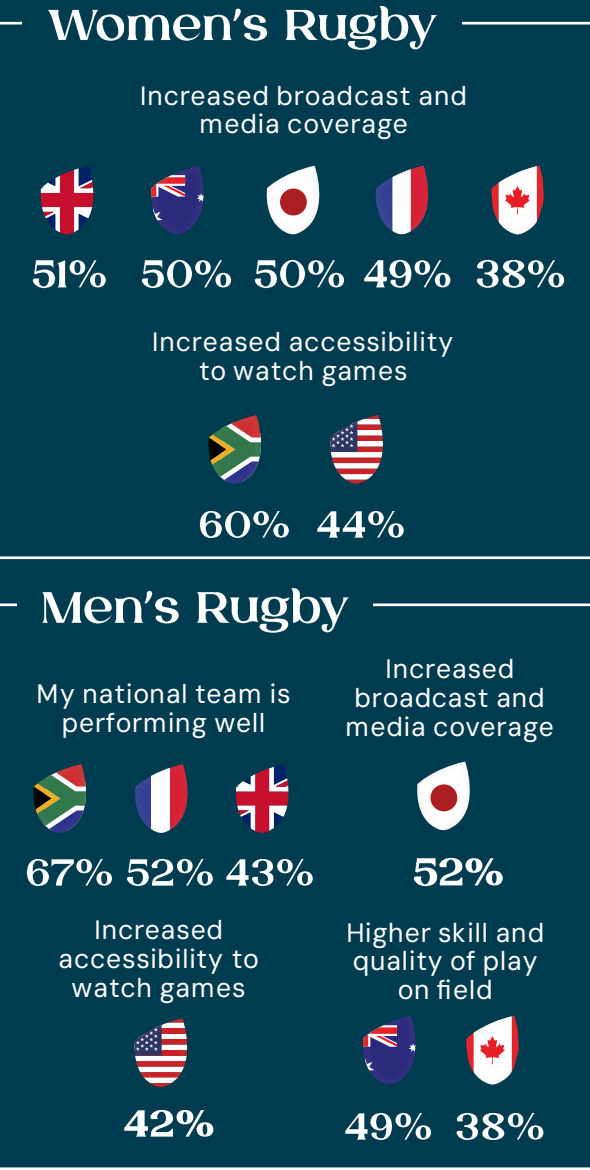
ACCESSIBILITY IS THE BIGGEST DRIVER OF ENGAGEMENT FOR WOMEN'S RUGBY FANS IN THE LAST FOUR YEARS

This trend contrasts with men's rugby in which fandom is more closely tied to the national team performance. To continue growing fan engagement in women's rugby, sustained focus on visibility and accessibility, with a 'always-on' approach will be key to keeping the game front-of-mind within the fanbase.



% of respondents whose engagement has slightly or significantly increased in the last four years

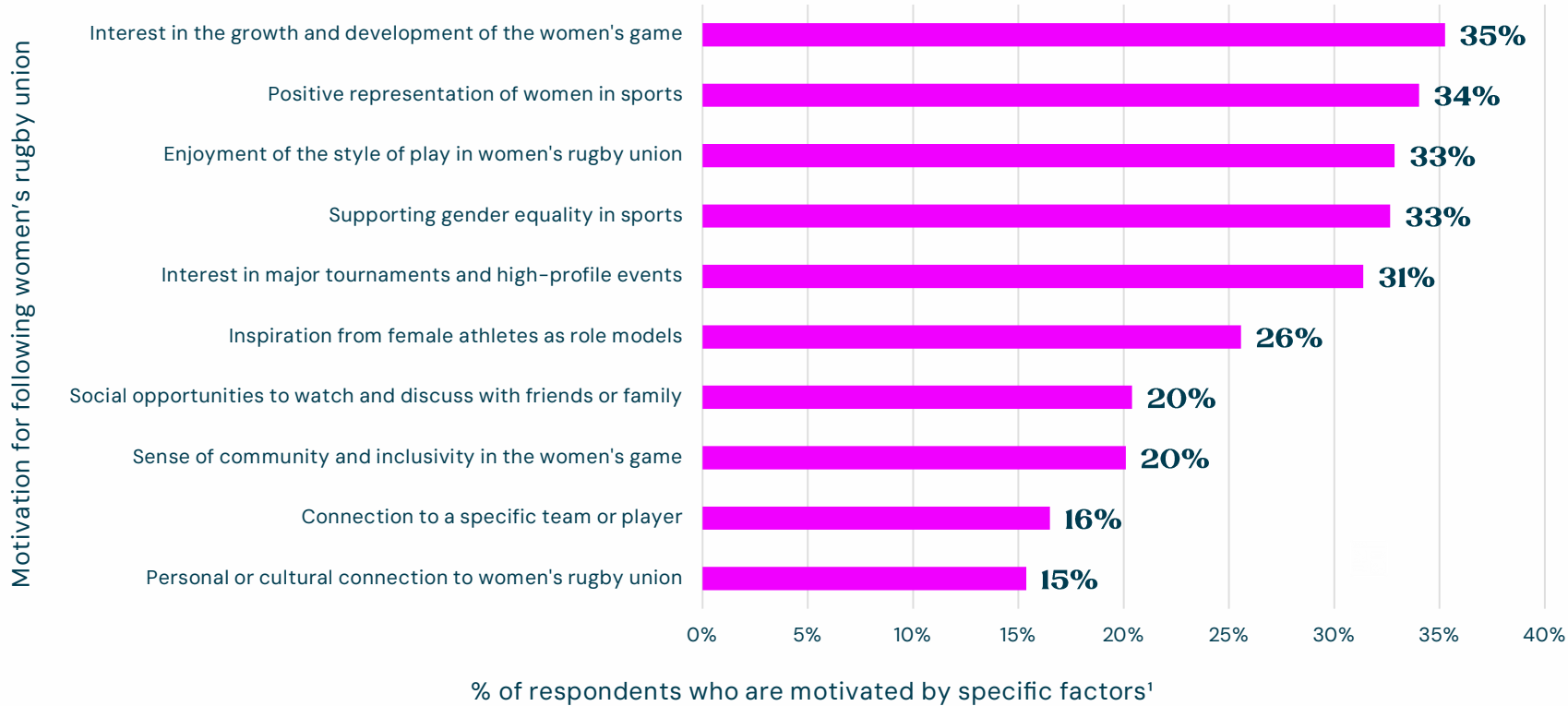
Top reasons for increased engagement



Source: GWI 2025 Women's Rugby Fan Survey. Q: What are the main reasons that your engagement in women's/men's rugby union has increased over time?

FANS OF WOMEN’S SPORTS CARE ABOUT MORE THAN JUST ON FIELD PLAY – WOMEN’S RUGBY FANS ARE NO DIFFERENT

Values tied to women’s sport – such as gender equality, positive representation, and growing the game – are powerful drivers of fan interest, alongside on-field performance and major events. Women’s rugby should actively embed these USPs into its marketing strategy to differentiate and attract new fans.



Market swings



of fans of women’s rugby in France are motivated to follow through major tournaments (vs average 31%)¹



of fans of women’s rugby in the USA are motivated to follow through their personal and cultural connection to women’s rugby (vs average 15%)¹



PWR top reason to follow



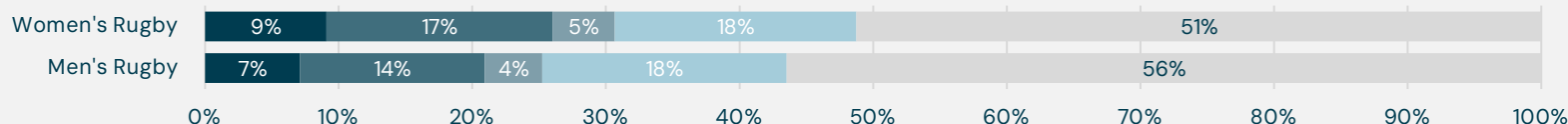
of followers of Premiership Women’s Rugby follow to support the growth of women’s sport²

Sources: (1) GWI 2025 Women’s Rugby Fan Survey. Q: What motivates you to follow women’s rugby union? Please select all that apply (2) YGS Premiership Women’s Rugby Wave 1 January Update

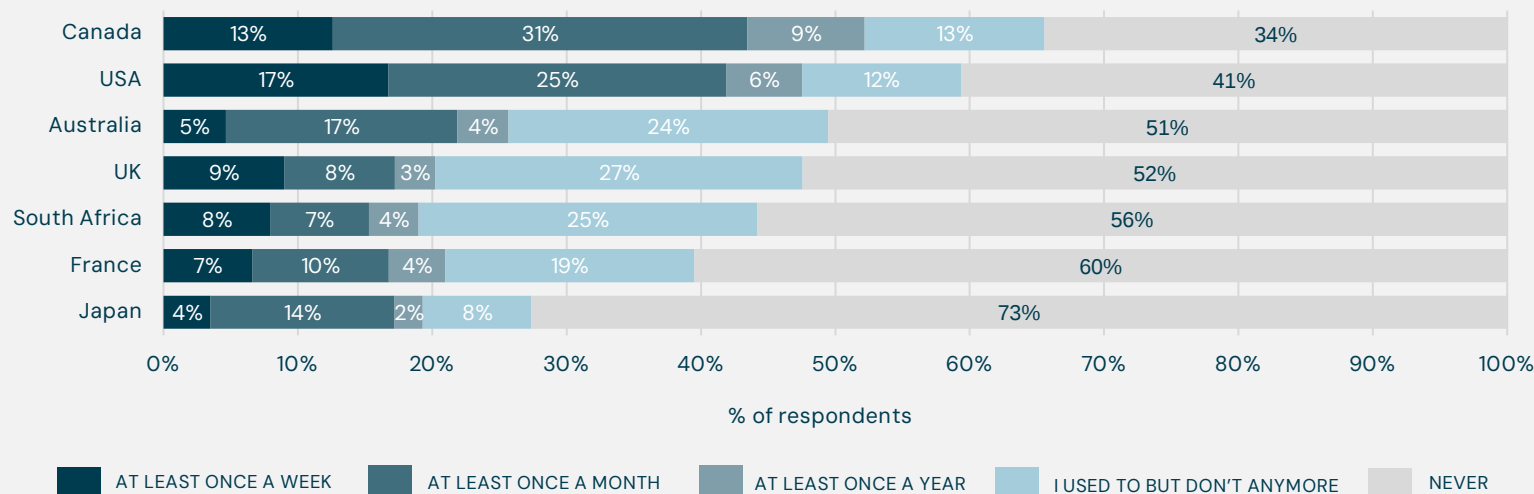
THE OPPORTUNITY: TO ACQUIRE NEW FANS BEYOND THOSE WHO PLAY THE GAME

The context: fans of women's rugby are more likely to play rugby at least once a month compared to fans of men's rugby. This connection between playing and following demonstrates the wider impact the game has on individuals, the communities built through participating and presents a powerful foundation for building lifetime fans of the sport.

Rugby Union Participation



Women's Rugby Fans



Markets expanding beyond the participation base:



The strategic challenge in the next 3-5 years is growing the sport beyond the existing player base.

The data demonstrates that the UK, South Africa and France are where the lowest proportion of women's rugby fans also play the sport.

This reflects the growing maturity of these markets, where fandom is increasingly driven by broader cultural interest – not just personal participation.

WOMEN'S RUGBY FANDOM: WHAT FANS WANT AND HOW THEY'RE EXPRESSING THEIR FANDOM

03

SECTION HIGHLIGHTS

Meeting the Modern Women's Rugby Fan – Access, Stories & Shifting Loyalties

Today's women's rugby fans are redefining what it means to be a supporter. They are **engaged, evolving, and eager for more**: more access, more content, and deeper connection with the athletes they admire.

Fan Interest is Growing – But Access is Key

- **55%** of women's rugby fans say their interest is set to grow, but only if they have the opportunity to watch, attend, and engage
- **41%** want more access to live matches, reinforcing that visibility is central to sustaining and growing fandom

Fans Follow People, Not Just Teams

Women's rugby fans are community-driven and player-focused, drawn to the personalities, values, and stories behind the game. They are reshaping traditional loyalty models:

- **41%** don't support a single club
- **25%** support two or more, reflecting fluid, modern fan behaviour aligned with trends across wider women's sport and youth culture

Content is Connection

- Today's fans are calling for more athlete-centered storytelling – from documentaries to short-form social content
- **Personal, authentic, and accessible stories** help deepen emotional investment and bring fans closer to the game and its stars

Why This Matters

- Women's rugby fandom is **driven by relevance and relatability**, not just geography or tradition
- To meet fans where they are, unions, leagues, and commercial partners must prioritise access to viewing, authentic storytelling, and innovative digital content



FANS BELIEVE THEIR INTEREST WILL GROW – BUT THEY NEED THE OPPORTUNITY TO WATCH, ATTEND AND ENGAGE

Over half of women's rugby fans anticipate their interest in the sport will grow in the future. Familiar platforms like TV and online streaming lead the way as vehicles for growth, with attendance and social media also playing key roles in driving future growth, especially outside of broadcast windows or non-tournament time.

55%

Markets With The Biggest
Expected Growth In
Women's Rugby Fandom



73%



66%



61%

of women's rugby fans believe their interest
in rugby union will grow in the future¹, with
fans wanting to...

1

Watch more
live games on TV and online²

41%

2

Attend more
matches in person²

25%

3

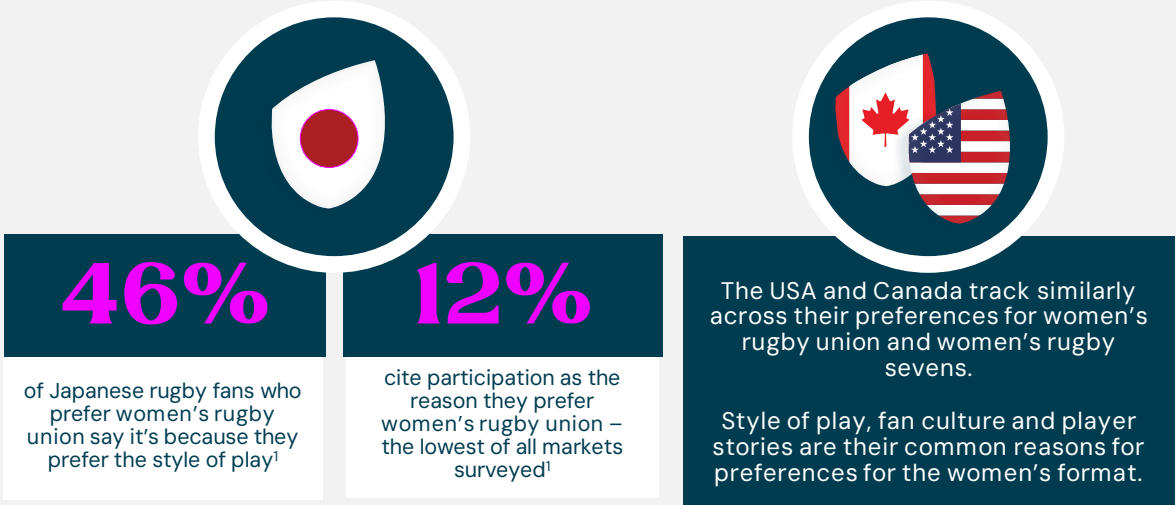
Follow more
on social media²

23%

TWICE AS MANY WOMEN'S RUGBY FANS SAY FAN CULTURE IS THE BIGGEST REASON THEY PREFER IT TO MEN'S RUGBY UNION

Fans of women's rugby are drawn to the stories, personalities, and strong community feel. Women's rugby connects more through emotion, culture, and character – making it a more personal experience. Many fans also play the sport themselves, which strengthens their connection to the women's game.

Market Swings – Rugby Union



Overall rugby union comparison:

Reason	Prefer Women's Rugby¹ (%)	Prefer Men's Rugby² (%)
I prefer the fan culture	33%	14%
I prefer the style of play	33%	38%
I prefer women's/men's sport overall	30%	38%
I find the players, personalities, and stories more interesting	28%	18%
My national/club teams are more competitive	24%	29%
It's just personal preference or habit	23%	33%
Attending live matches is more accessible	22%	18%
I participate in the game	20%	8%

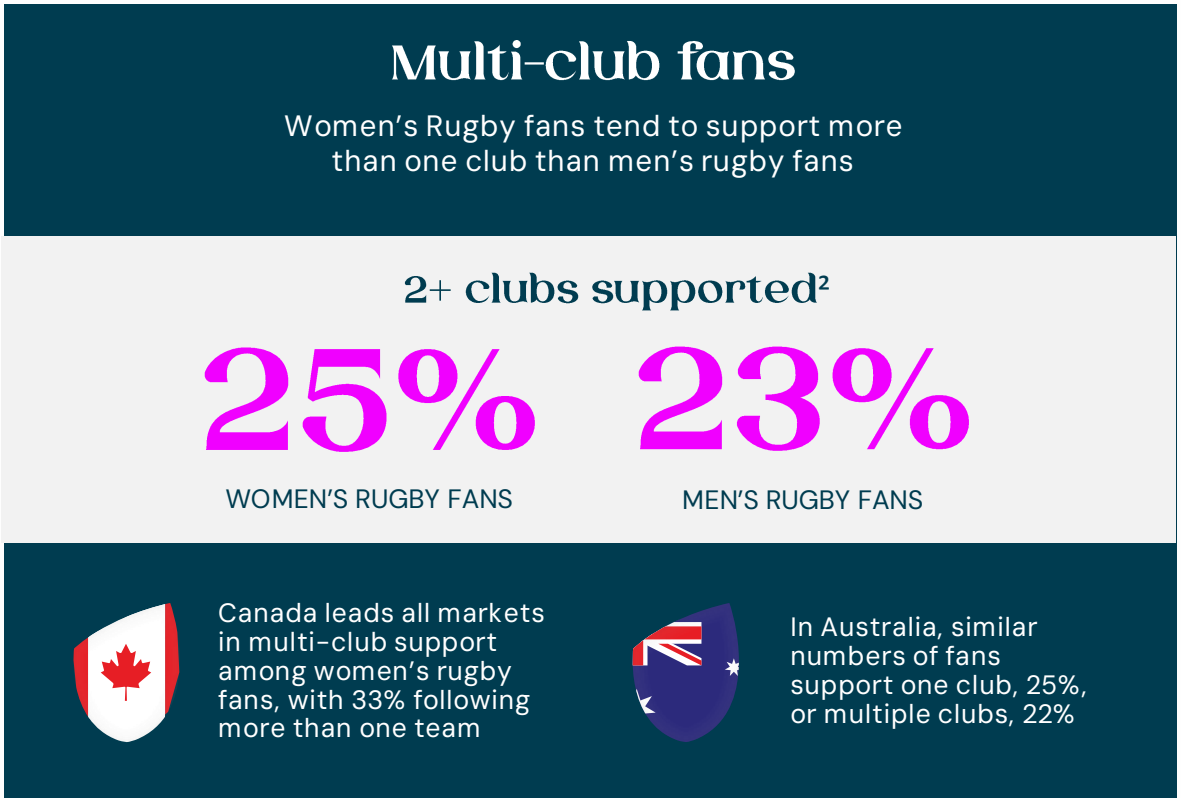
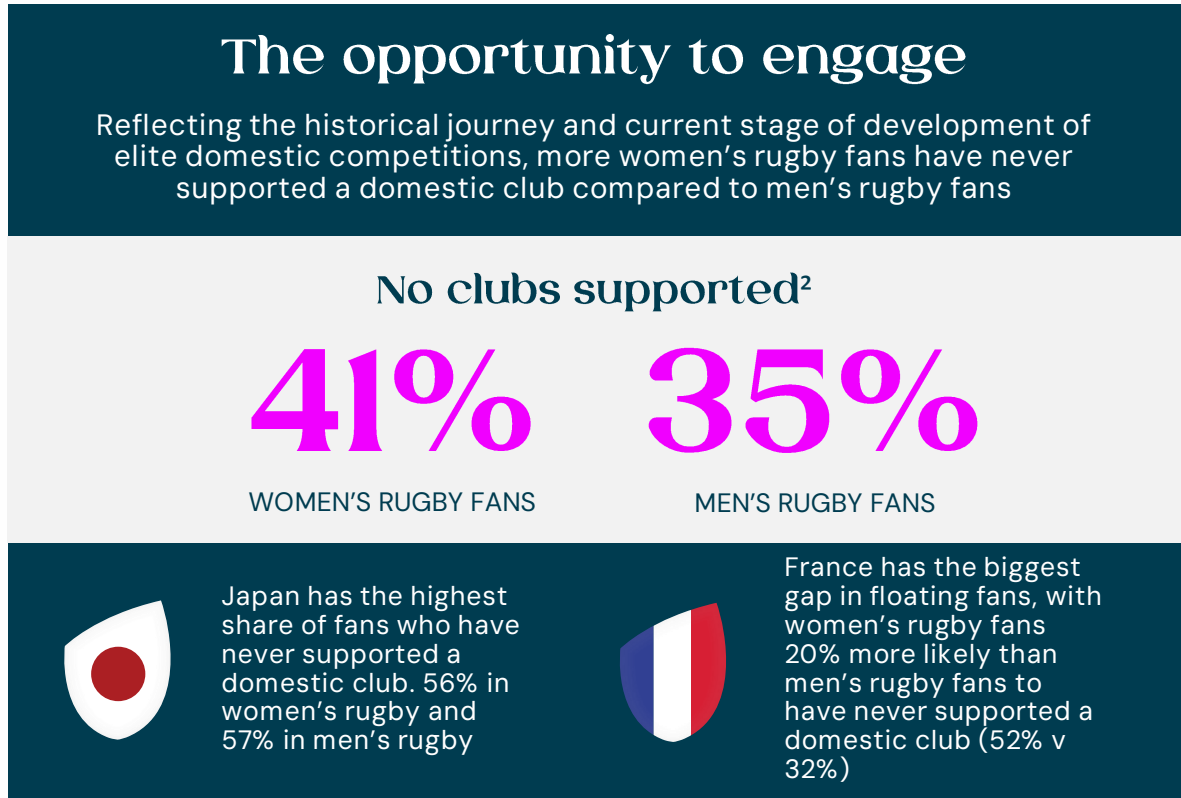
Sevens deep-dive:

Reason	Prefer Women's Rugby Sevens³ (%)	Prefer Men's Rugby Sevens⁴ (%)
I prefer the style of play	35%	39%
I prefer women's/men's sport	34%	40%
I prefer the fan culture	31%	18%
Players/personalities more interesting	26%	20%
National/club teams more competitive	24%	24%
Personal preference or habit	23%	31%
Attending live matches more accessible	20%	19%
I participate in the game	19%	9%

Source: GWI 2025 Women's Rugby Fan Survey (1) Q: Why do you prefer women's rugby union over men's rugby union? (2) Q: Why do you prefer men's rugby union over women's rugby union? (3) Q: Why do you prefer women's rugby sevens over men's rugby sevens? (4) Q: Why do you prefer men's rugby sevens over women's rugby sevens?

WOMEN'S RUGBY FANS ARE REDEFINING TRADITIONAL CLUB ALLEGIANCE, EMBRACING FLUID FAN BEHAVIOUR

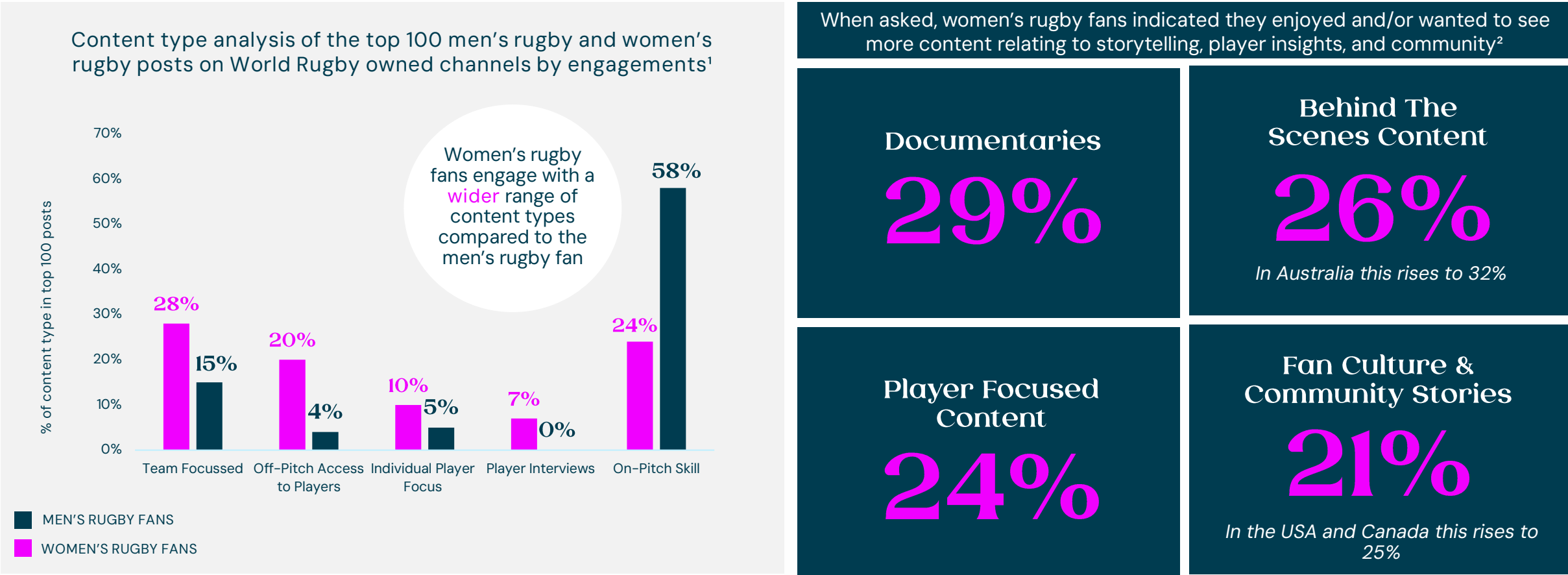
Fluid fans are defined as open to change, empowered to choose, and continuously evolving¹. This unlocks support that goes beyond single-club loyalties, as is common in traditional sports fandom, fostering a vibrant culture rooted in shared experiences and values rather than club tribalism. This also opens new revenue opportunities as these fans are willing to try new experiences and new modes of engagement. As the sport matures, greater club loyalty driven by intergenerational ties and closer local connections, will deepen fandom and drive habitual consumption of the sport.



Sources: (1) SportsLab (February 2020) (2) GWI 2025 Women's Rugby Fan Survey Q: Do you support a men's/women's rugby union domestic club?

WOMEN’S RUGBY THRIVES THROUGH SOCIAL STORYTELLING

Women’s rugby fans engage with a rich mix of content – from off-pitch stories to player features and fan culture. While men’s rugby sees stronger engagement with on-pitch content, there’s growing opportunity to build this area in the women’s game. As the quality of play rises, so does the chance to spotlight elite athleticism – while continuing to invest in the storytelling that brings the game and its personalities to life.



WALLAROOS: BUILDING AUDIENCES AND PROFILE ON THE ROAD TO WOMEN'S RUGBY WORLD CUP 2029

Since 2023, Rugby Australia has taken a targeted approach to growing the awareness and profile of the Wallaroos, to build audiences and prominence as future hosts of Women's Rugby World Cup 2029. Alongside the evolution of its women's high-performance programme – demonstrated by a title win at WXV 2 in 2024 – driving visibility and coverage of the team, its players and their growing fanbase has been a key strategic focus.

Key to this approach has been:

Increasing resources for content production, particularly by embedding more personnel during key competition and training windows

Upskilling and mentoring the content team (trend and impact focused) and boosting collaboration within Rugby Australia to help leverage the Wallaroos visibility

Tracking and reviewing data and insights year-on-year to develop and evolve better ways to create and deliver digital content

Ensuring an 'always-on' presence across social and digital platforms to underpin tentpole moments, such as international tournaments and match days



Since 2023, across Wallaroos social channels, this targeted approach has led to...

985%

Increase in social media followers

623%

Increase in social media engagements

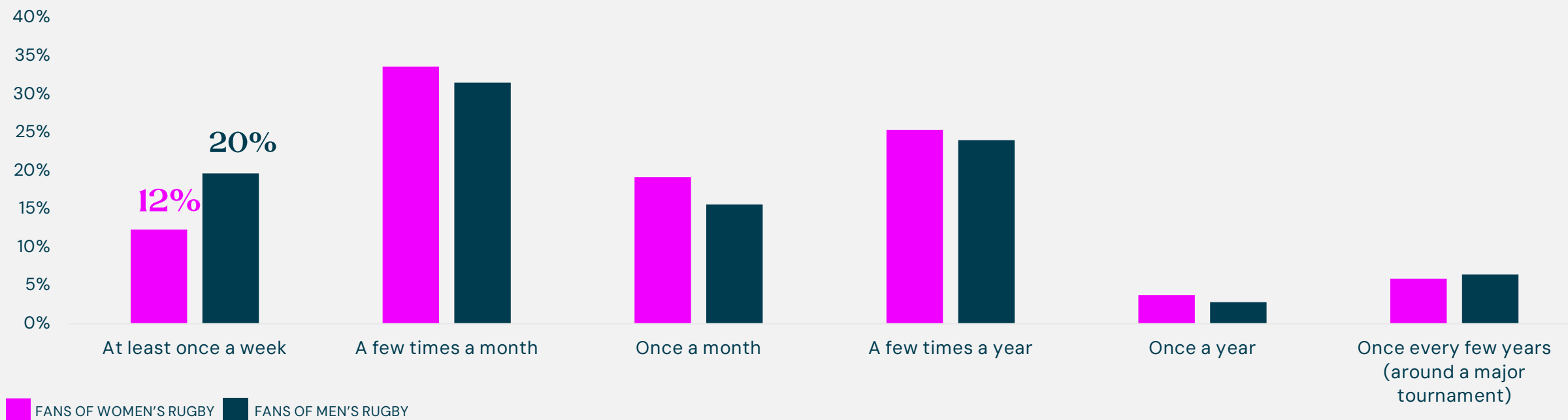
3700%

Increase in social media views

FANS OF WOMEN'S RUGBY ENGAGE LESS FREQUENTLY THAN MEN'S FANS

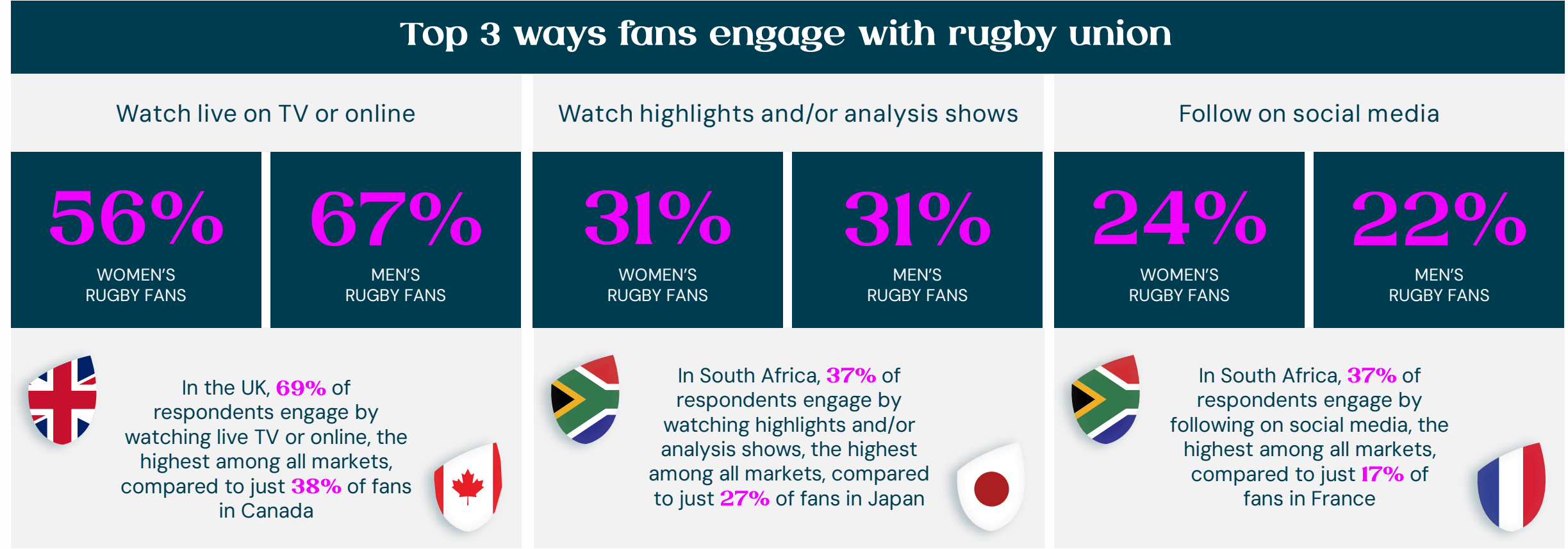
While nearly half of women's rugby fans engage with rugby at least a few times a month, the frequency of engagement is lower than that of men's rugby fans, with only 12% of women's rugby fans engaging weekly compared with 20% of men's rugby fans. Increasing how often fans engage with women's rugby is key to developing a more avid and commercially valuable fanbase. The best way to increase engagement: give fans more opportunities, to watch, follow, and attend women's rugby matches

Fan Engagement With Rugby



THE BROADCAST ENGAGEMENT OPPORTUNITY

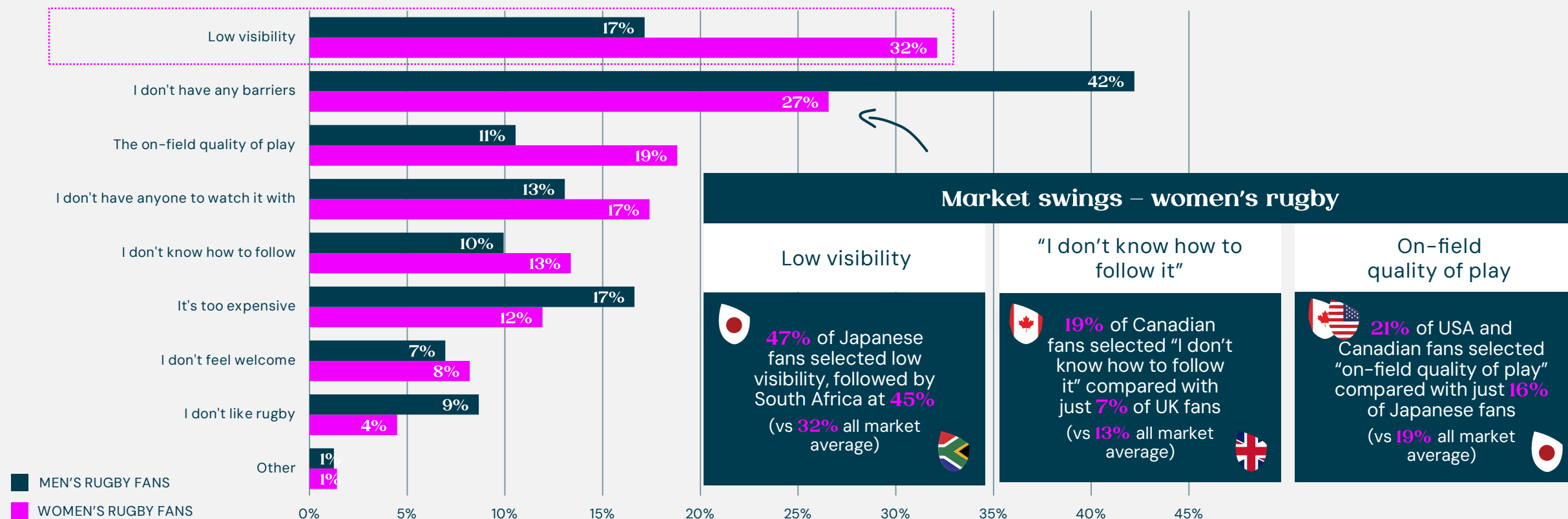
Watching live – either on TV or online – is the most common way fans engage with rugby, across both the men’s and women’s games. However, there is a notable gap in the proportion of fans watching women’s rugby compared to men’s rugby (56% vs. 67%). While it remains the leading engagement channel, there is still work to do to close this gap. Improving the visibility, quality, and accessibility of women’s rugby broadcasts – and clearly signposting where fans can watch – will be key to increasing engagement.



VISIBILITY IS THE GATEWAY TO GROWTH

A lack of visibility is the main barrier to deeper engagement with women's rugby – an issue far less evident in the men's game. Limited and less accessible pathways create friction that restricts discovery. This visibility gap reflects broader systemic barriers to growth.

Barriers in engaging with women's rugby



WOMEN'S RUGBY FANDOM: FEMALE ATHLETES DELIVER – INFLUENCE AND DIRECT FAN CONNECTION

SECTION HIGHLIGHTS

The Power of Female Athletes – Influence, Trust & Commercial Impact

Female athletes are not only excelling on the pitch, they are proving to be high-impact drivers of engagement, trust, and value across the sports and commercial landscape. In women's rugby, their influence is a key accelerant of the sport's rise.



Trusted Voices, Authentic Influence

- Fans of women's sport are **2.8x** more likely¹ to purchase a product recommended by a female athlete than by any other type of influencer
- **57%** of consumers trust¹ that female athletes genuinely believe in the products they endorse – **14%** more than for male athletes, highlighting a trust premium
- Female athletes are seen as relatable, authentic, and purpose-driven – qualities that align with what modern fans and consumers expect from brand ambassadors

Inspiring Role Models

- A resounding **88%** of people view professional female athletes as powerful role models¹ for young women, reinforcing their broader cultural and social relevance
- Their impact extends far beyond sport, shaping perceptions, behaviours, and aspirations for the next generation

Social Media Momentum

- In 2024, the social media audiences of individual female athletes in North America grew faster than the audiences of many major global sports tournaments², underlining their rising digital influence and global resonance
- This growth **underscores the opportunity to invest in athlete storytelling** and personal brands to deepen fan engagement and drive value

Why This Matters

- In women's rugby, investing in and platforming athletes isn't just the right thing to do – it's a smart, high-return strategy
- **Female athletes connect, convert, and lead.** Their voices are trusted, their stories matter, and their platforms have the power to transform both fan loyalty and brand outcomes

FEMALE ATHLETES ARE DRIVING THE GROWTH OF WOMEN'S SPORT

Female athletes drive engagement in women's sports through **performance, personality, advocacy, and marketability**. Their influence reshapes narratives, boosts visibility, and proves women's sports can attract major audiences and commercial success.

Female athletes have greater influence than other types of influencers

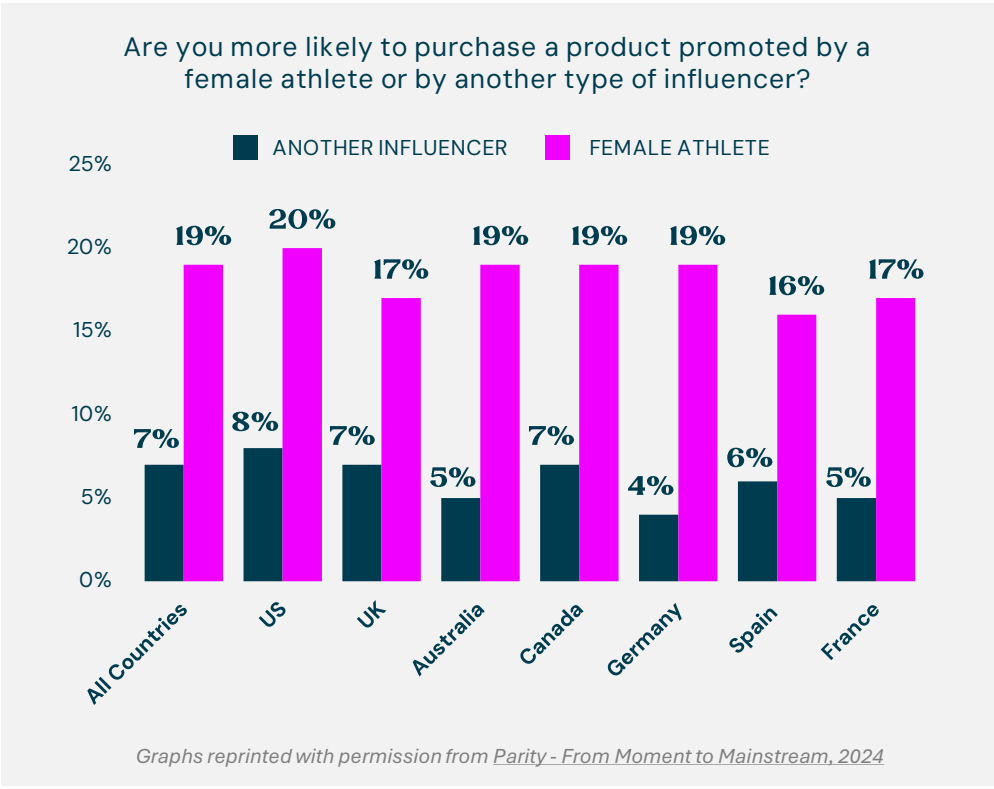
Women's sports fans are...

2.8x
more likely to purchase a product recommended by a female athlete than by another influencer type¹

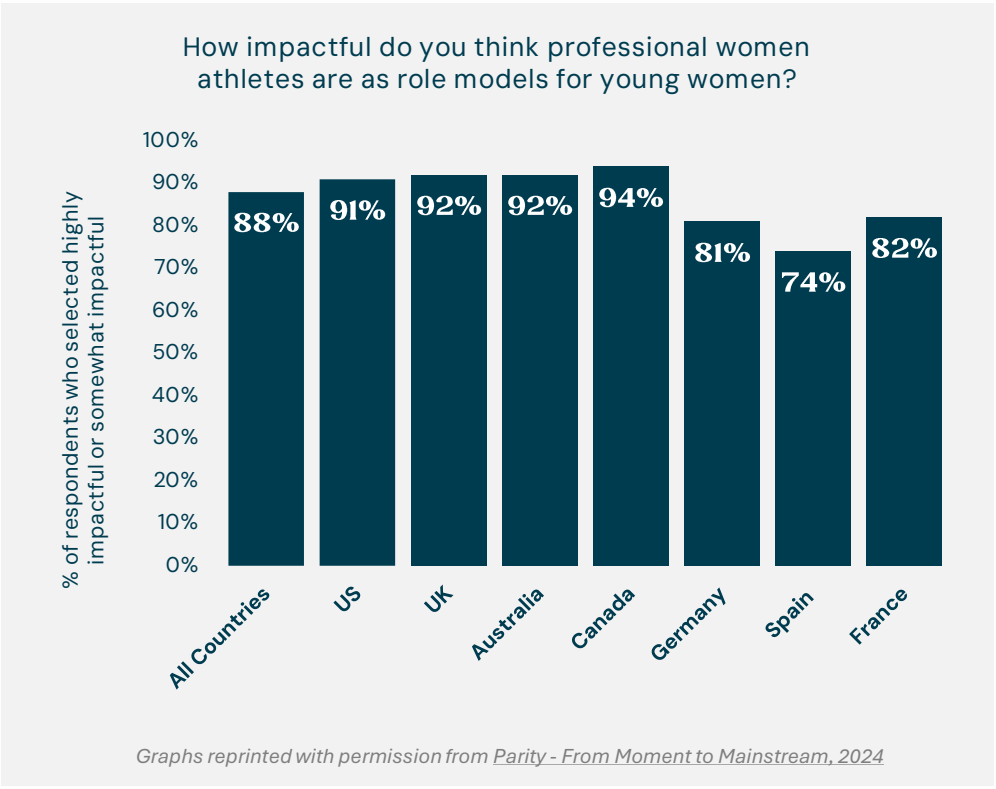
88%
of people see professional female athletes as impactful role models for young women¹

57%
of consumers trust that female athletes genuinely believe in the products they promote (14% higher than their trust in male athletes)¹

Women's sports fans are influenced by female athletes....



...and view them as powerful role models for young women



WITH GENERATIONAL SUPERSTARS DRIVING THE GROWTH OF INDIVIDUAL SPORTS

WNBA and the Caitlin Clark effect

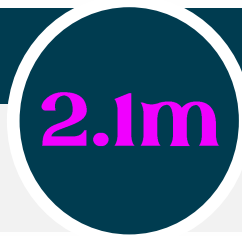
The WNBA (USA) is experiencing a significant period of growth, led in part by once-in-a-generation star players who are capturing the attention of audiences both in domestic markets and globally. It could be argued that no athlete has contributed more significantly to this trend than Caitlin Clark. In 2024, after a record-breaking College career she became the No.1 WNBA draft pick and made waves off the court too. From sold-out attendances, record-breaking TV ratings, commercial revenue growth and highly engaged audiences on social media, Clark has become a global case study on how female athletes can contribute to game-changing growth for women's sports.

Growing fans and revenues across the 2024 season...



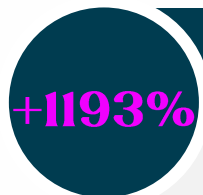
Indiana Fever average attendance

Clark has significantly increased attendances at Fever matches. The 2024 average was higher than the equivalent figure for the NBA's Indiana Pacers¹.



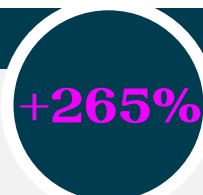
Viewers for Caitlin Clark's WNBA debut

Such was the anticipation for Clark's debut for Indiana Fever that it set a record for WNBA games on ABC, which represented the second-most watched WNBA since 2002²



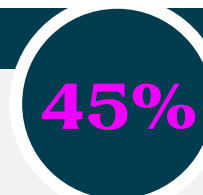
Indiana Fever jersey sales

Interest in Clark has translated to a significant increase in appetite for Indiana Fever jerseys³.



YoY attendance increase

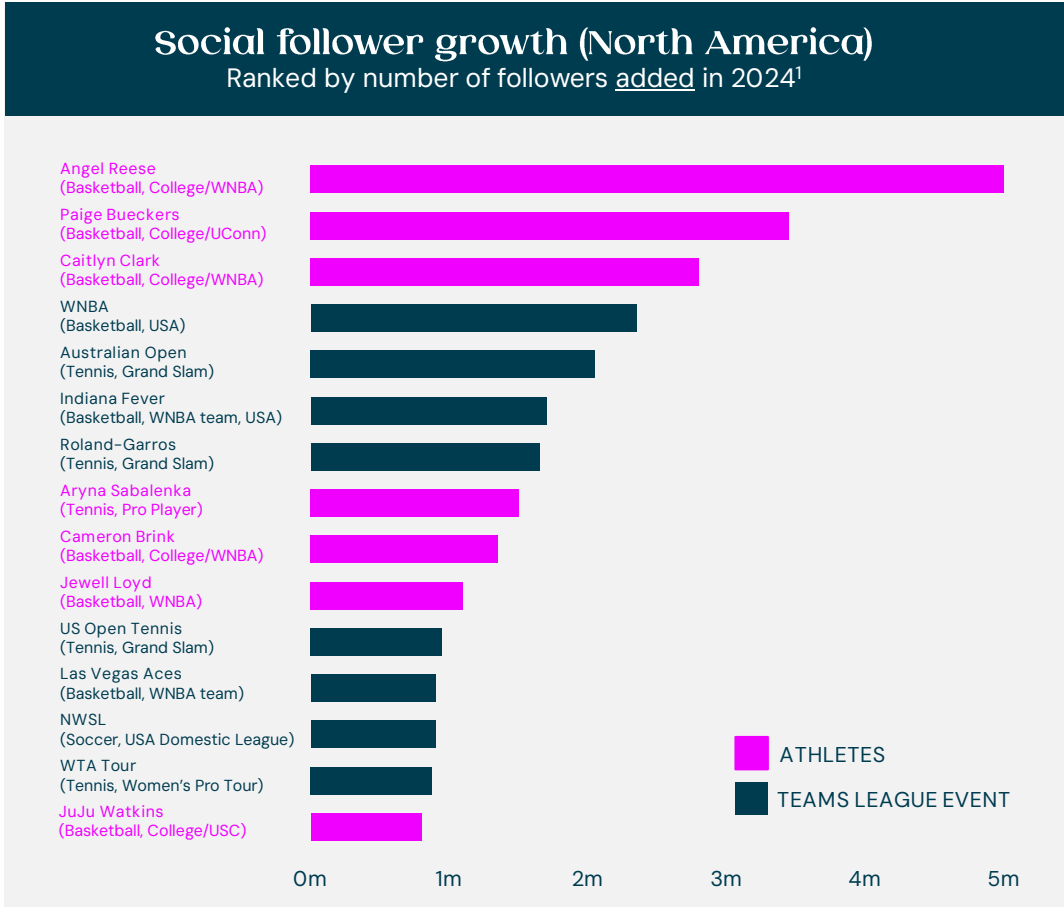
Growth in attendances for Indiana Fever have resulted in significant uplift in ticket revenue⁴



Broadcast value from Indiana Fever games

Indiana Fever contributes a disproportionate proportion of total broadcast value within the WNBA⁵

AND THESE SUPERSTAR FEMALE ATHLETES SOCIAL MEDIA PRESENCE IS GROWING MORE QUICKLY THAN ESTABLISHED SPORTING PROPERTIES



RUGBY'S OWN SUPERSTAR —

The impact of Ilona Maher

Ilona Maher (USA rugby player) first gained international attention through her social media presence during her time competing at the Tokyo 2020 Olympic Games. Her profile continued to rise, gaining continued recognition and growing her social media following as a member of the USA team that won a bronze medal at the Paris 2024 Olympic Games. By showcasing her powerful personality on social media, Ilona has helped to bring new global audiences to the women's game and rugby in general. Maher is the world's most followed rugby player with more than 8.7 million followers across Instagram and TikTok.¹

Beyond rugby and into culture and entertainment



Ilona's visibility extended beyond rugby with her Dancing With The Stars appearance, becoming a Sports Illustrated Swimsuit model, and being named on Forbes' 30 under 30 list²

Brand partnerships

Ilona is leading the way with her commercial partnerships working with several consumer brands including L'Oreal, New Era, Adidas, Paula's Choice, and Coppertone. She also fronted Adidas's launch of their first-ever female specific rugby boot, alongside other leading international female rugby players.

L'ORÉAL



Coppertone



PAULA'S CHOICE SKINCARE



During the Paris 2024 Olympic Games, Ilona's charisma and witty behind the scenes content captivated audiences, driving her Instagram following from³

580k to 2m

Representing an increase³ of

257%

From TikTok to tickets...

The increased visibility on women's rugby is powering a new wave of fandom for the sport within the US, with record-breaking crowds seen for the USA Women's Eagles as they prepare for Women's Rugby World Cup 2025.

10,518

Record crowd for a women's rugby match in the United States (May 2025)⁴

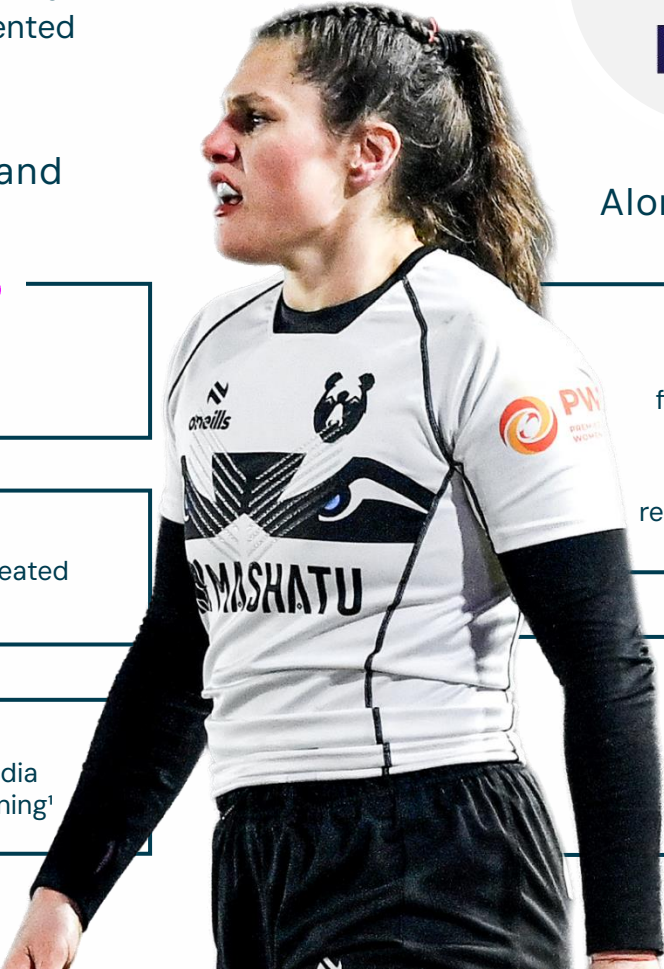
73%

Of ticket holders were first-time buyers to the CPKC Stadium in Kansas⁵

BRISTOL BEARS AND THE ILONA MAHER EFFECT

Maher signed with Bristol Bears (Premiership Women's Rugby Club), to transition to 15-a-side in order to boost her chances of selection for the Women's Rugby World Cup 2025. Maher's arrival sparked unprecedented interest in both the club and the PWR league, fuelling a surge in fan engagement, record attendances, and social media growth.

Following Ilona's arrival to the Club, Bristol Bears social and digital channels saw...



Alongside new and diverse audiences...



AND ACROSS THE GAME, PLAYERS CONTINUE TO BUILD AUDIENCES AND DIRECT CONNECTIONS WITH FANS



422k

KATELYN
VAHA'AKOLO
@katelynvahaakolo¹



414k

DHYS FALEAFAGA
@dhysfaleafaga¹



309k

SAMMY SULLIVAN
@sam_sull_¹



202k

CHARLOTTE CASLICK
@charlottecaslick¹



176k

GRACE ADHIAMBO
@adhiambo_okulu_oly¹

39%

of women's rugby fans said that increased visibility of players has driven increased engagement in women's rugby²

This increases to 46% in Australia and 43% in the US

The rise of women's rugby is being powered by its players and their powerful personalities. Star athletes are not only inspiring fans through their on-pitch performances but are also capturing attention through social media and global platforms

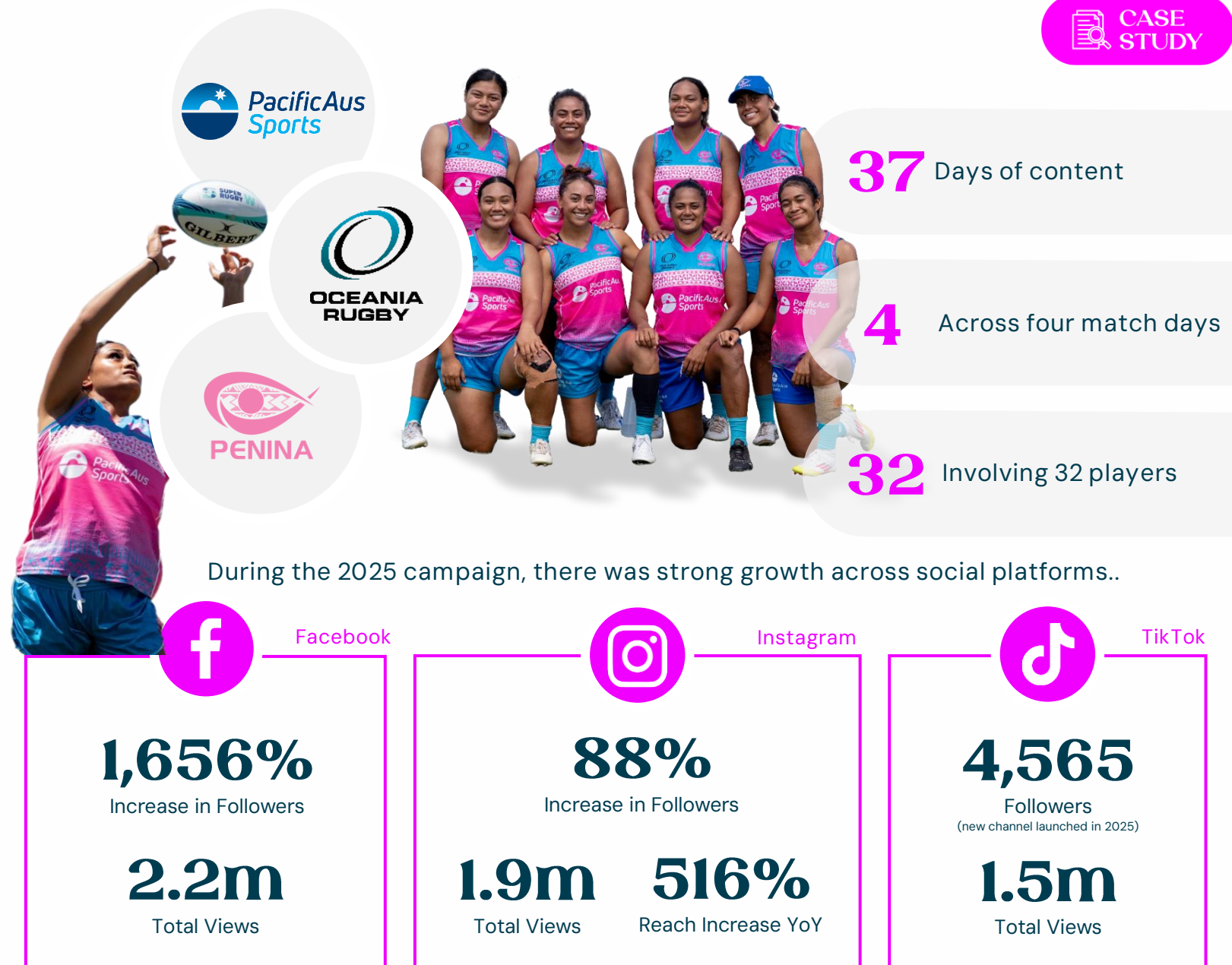
PENINA PASIFIKA

Powerful Storytelling Fuels Audience Growth

The Penina Pasifika programme, delivered in partnership with Oceania Rugby under the Pacific Women's Pathway initiative, is part of the Australian Pacific Rugby Union Partnership and is supported by PacificAus Sports, a programme funded by the Australian Government. The initiative aims to strengthen the pathway for Pacific women in rugby, offering valuable playing opportunities and professional development to aspiring elite athletes.

In 2025, the Penina Pasifika team embarked on a five-week tour of Australia, playing against each Australian Super W club. Coverage of the campaign, to drive the profile and visibility, was led by a content producer fully embedded into the squad environment.

By focusing on inspirational storytelling, portraying powerful player personalities and behind-the-scenes coverage, across a period of five weeks, social media results demonstrated the strong connections and engagement built with fans all whilst driving awareness of Penina Pasifika.



THE COMMERCIAL OPPORTUNITY IN WOMEN'S SPORTS

SECTION HIGHLIGHTS

Commercial Momentum – A Game-Changing Opportunity for Women's Rugby

The global rise of women's sport is **translating into unprecedented financial growth and brand opportunity**, and women's rugby is emerging as one of its most exciting frontiers. Backed by accelerating fan engagement and a values-driven audience, the sport is primed for commercial success.

Unstoppable Market Growth

- Women's elite sport is forecast to generate **£1.8 billion** in global revenue by 2025, according to Deloitte, a **240%** increase since 2022
- The North American market is currently leading the charge, but the opportunity is truly global—and growing

Women's Rugby: The Next Sponsorship Frontier

- With growing audiences and cultural momentum, women's rugby offers untapped potential for sponsors and investors
- But **real impact will come by going beyond the traditional playbook**, by investing in storytelling, authenticity, and long-term partnerships

Fans Who Amplify

- **42%** of women's rugby fans say they're more likely to talk to friends and family about a brand, compared to just **33%** of men's rugby fans, making them powerful brand advocates
- **73%** believe brands have an authentic role to play in raising the visibility of the women's game, showing a clear alignment between values and commercial support

The Merchandise Gap = Growth Potential

- Fans are ready to spend, but they want better, more tailored merchandise options that reflect their passion for the game
- The wider women's sport market is already proving this demand: The WNBA saw a **601%** year-over-year increase in merchandise sales during the 2024 season

Why This Matters

- The commercial ecosystem around women's rugby is primed for acceleration, but **seizing the moment requires innovative thinking, bold investment, and fan-first strategies**
- Brands that engage now are not just backing a sport, they're joining a movement with purpose, passion, and momentum

THE RAPID AND RISING VALUE OF WOMEN'S SPORT



See next page for highlights within the North American Market



£100m

Projected overall revenue for Women's Super League clubs (football, England) in 2025/26 season⁴

£1.8b

Deloitte's prediction for the global revenue generated by women's elite sports in 2025, which represents 240% growth since 2022¹



17.4m

Peak Broadcast Audience

for UEFA Women's Euro 2022 (football)²



54m

Broadcast Audience

in China for China v England – FIFA Women's World Cup 2023. The tournament's highest audience for a single match globally (football)³



£465m

Total Value

of the five franchises sold in the inaugural Women's Premier League (cricket, India, 2023)⁵



£418m

Revenue Generated

FIFA Women's World Cup Australia and New Zealand 2023 (football)⁶

NORTH AMERICA: THE LEADING MARKET FOR WOMEN'S SPORTS



£1.48b

National Women's Soccer League (NWSL)
Valuation

It is estimated that the 14 teams in the NWSL are collectively worth nearly **£1.48b**¹.

- Angel City FC ranks highest with an estimated value of **£208m**, with a wide array of investors, including CEO of Walt Disney Company, Bob Iger, and entrepreneurs, sporting legends and celebrities including Julie Urman, Alexis Ohanian, Billie Jean King, Natalie Portman and Eva Longoria²



£298m

New York Liberty Valuation

Forbes, ranked the New York Liberty (basketball, USA, June 2025) as the highest valued WNBA team with an average franchise valuation across the 13-team league of **£202m**².

- Back in 2019, the New York Liberty was reportedly purchased for **£7-10m**
- The team's official mascot, **Ellie The Elephant**, has garnered a strong following on social media and in mainstream media, as well as contributing to a **70%** growth in partnership revenue³



92,003

Game attendance

World record attendance for a women's sporting event – Nebraska Volleyball Day (USA, 2023)⁴. The event generated:

- A social media valuation of over **\$2.1m** USD
- Over **52m** social media impressions



1.2m

Fans in first 2 seasons

In 2023, with investment from the Mark Walter Group, the Professional Women's Hockey League (PWHL, ice hockey), was established. With strong growth year-on-year the 6-team league played across Canada and the US, is already expanding with two new franchises due to launch in Seattle and Vancouver for the 2025/26 season⁵

In Spring, 2024, the PWHL set a new world record attendance for a women's ice hockey game of **21,105**⁶. From the 2024 to 2025 seasons, year-on-year the league and teams saw⁷ –

- **50%** increase in league and team partnership portfolio
- **68%** increase in league and team social media impressions
- **100%** growth in merchandise sales including collections with Barbie and Lululemon

30%

growth in the US women's sports market year-on-year from 2023 to 2024, driven by greater investments in sponsorship, broadcasting, and commercial partnerships. This increase comes as a direct result of increased viewership, attendance, and engagement across the women's sports landscape⁸

67%

of fans of women's sports in the US say they make a point to support brands that sponsor their favourite athletes or teams⁸



THE OPPORTUNITY FOR BRANDS IN WOMEN'S RUGBY

Women's rugby is one of sport's most exciting sponsorship frontiers—but unlocking its potential means going beyond the playbook. Fans of women's rugby show stronger positive sentiment towards brands that support the game, compared to fans of men's rugby. They believe brands can play a powerful, authentic role in shaping the sport's future – by increasing visibility, funding growth, and opening it up to new audiences.



73%

of women's rugby fans agree that brands have an authentic role in boosting visibility of women's rugby¹

71%

of women's rugby fans agree that brands have an authentic role in funding the sport to drive growth¹

70%

of women's rugby fans agree that brands have an authentic role in helping women's rugby to reach new audiences¹

42%

of women's rugby fans are more likely to talk to family and friends about the brand, compared to 33% of men's rugby fans²

£5.36

For every £1 corporate sponsors invest in women's sport, they see an average of customer value return of £5.36³



WOMEN'S SPORTS FANS ARE MORE RECEPTIVE TO BRANDS



42%

Consider the brand more than competitors vs 36% of fans of men's sport¹

40%

Engage with the brand vs 34% of fans of men's sport¹

36%

More likely to purchase products when a brand supports women's sports or partners with female athletes. This rises to 44% in the US, 40% in Canada and 37% in Australia³

With women's sport attracting a more gender-balanced audience, female fans now represent a powerful and growing opportunity for brands. Sports fans who are **female** are:

9%

More likely to have visited experiential spaces or fan zones at sporting events²

16%

More likely to notice branded experiences/pop-up shops at sporting events²



WOMEN'S SPORT IS PROVING THE BUSINESS CASE FOR INVESTMENT WITHIN THE MERCHANDISE MARKET

Merchandise is a natural fit for women's sport, with a gender balanced audience wanting to show their advocacy. Demand exceeds supply due to existing limited product ranges and licensing, creating an opportunity to both expand offerings and innovate.

The Challenge

25%

of women's sports fans made purchases in the last 3 years vs 57% of men's sports fans¹

x9

More product options for major men's leagues than for women's leagues¹

The Opportunity

+23%

YoY New Balance revenue growth the same year they launched their innovative Coco Gauff G1 shoe collaboration¹

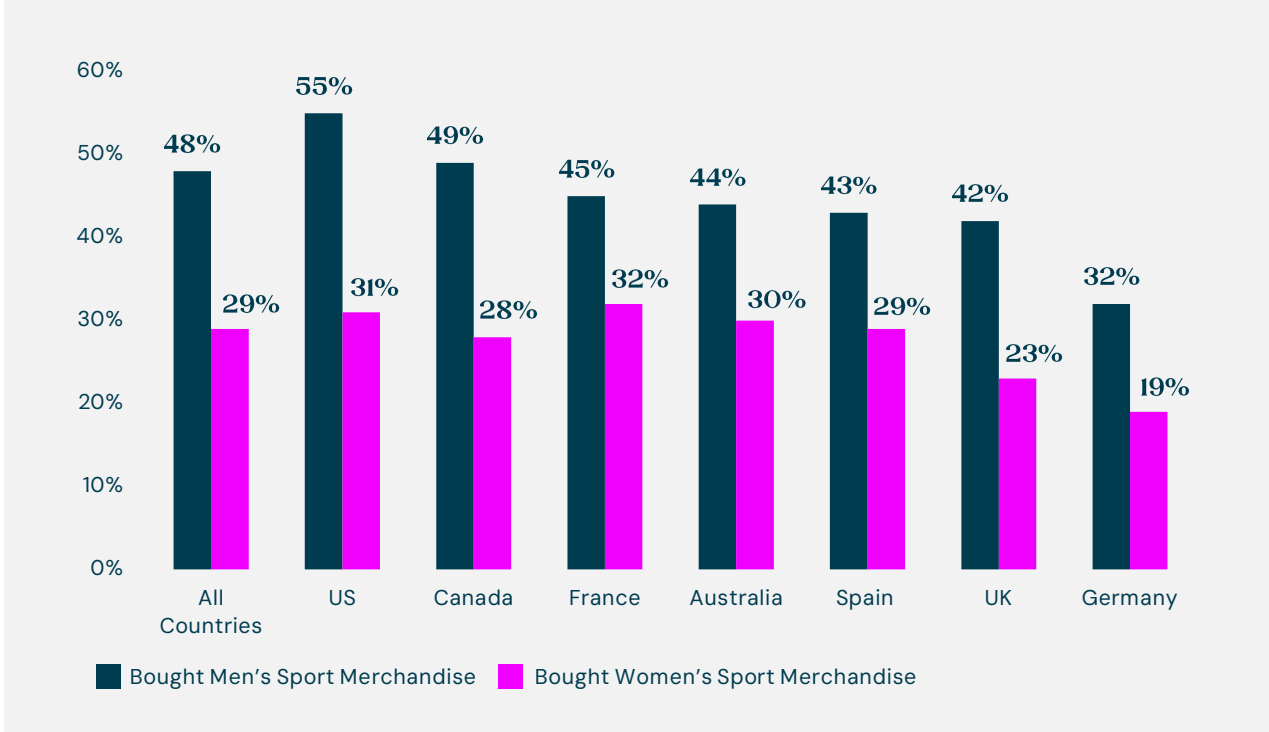
79%

of survey respondents said they would buy more women's sports merchandise if they could¹

£3.3bn

Value of the women's sport merchandise market in the US¹

Percentage of Fans Buying Sports Merchandise in the Last Three Years



WOMEN'S RUGBY FANS SPEND MORE ON MERCHANDISE – AND ARE LOOKING FOR MORE OPTIONS

While only 9% of women's rugby fans currently purchase merchandise, those who do are highly valuable – spending 16% more on average than fans of men's rugby. This highlights a clear commercial opportunity to grow revenue by converting more fans into purchasers through strategic improvements to price, quality, and product range.



Sources: GWI 2025 Women's Rugby Fan Survey. (1) Q: How do you engage with rugby union? (Buy Merchandise) (2) Q: How much do you typically spend in a year on rugby union merchandise? (3) Q: What would encourage you to spend more on rugby union merchandise?

HOW WOMEN'S SPORT IS BRIDGING THE MERCHANDISE GAP

The demand is there. Brands must rethink their approach, collaborate with athletes in new and creative ways, and expand offerings to unlock this untapped market

Togethr: Everyone Watches Women's Sport

Togethr, the lifestyle brand and media company built around women's sports, has tallied **\$6 million** in revenue from its "Everyone Watches Women's Sports" merchandise line in 2024, which included selling **20,000** units – T-shirts, tote bags and hoodies – in a three-day stretch towards the end of the women's NCAA basketball tournament¹.



WNBA : Merchandise Strategy & Sales

The 2024 WNBA season saw a **601%** YoY increase in merchandise sales². This was driven by:

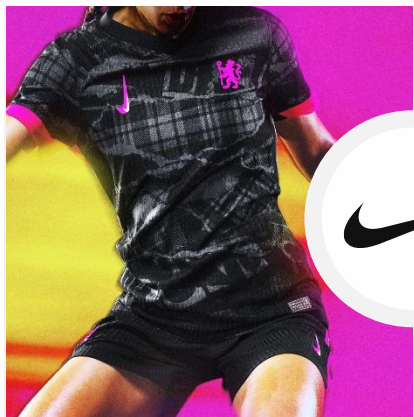
- Expanded merchandise beyond traditional jerseys to include trendy athleisure, casual wear, and accessories
- Player-focused merchandise, such as signature lines for star players, tapping into player fandom
- Merchandise that supports social and cultural initiatives and causes with proceeds donated to related organisations



Nike: Together We Rise

Nike's "Together We Rise" campaign for the 2024/25 season featured a distinctive alteration to the iconic Nike 'Swoosh' logo on the third kits of several football clubs, including Liverpool, Chelsea, and Tottenham Hotspur³.

In this campaign, the Swoosh was rotated 90 degrees to a vertical position and doubled, to **acknowledge the rapid ascent, growth and acceleration of women's football**.



FIFA Women's World Cup 2023 : Mary Earps & Nike

Before the 2023 Women's World Cup, Nike decided not to sell Mary Earps's England goalkeeper shirt, sparking widespread backlash from fans. A Change.org petition amassed **150,000+** signatures. Under pressure, Nike later released a limited number of shirts, which sold out in minutes, proving massive demand⁴.

CONCLUSION: FANDOM, FINANCIAL GROWTH AND THE ROAD AHEAD

A REMINDER: THE BLUEPRINT FOR GROWTH

To fully unlock the commercial potential of women's rugby, collaboration is essential – between World Rugby, unions, sponsors, broadcasters, and players. A coordinated, long-term approach is needed, **with everyone working toward the same goal: building visibility.**

A recent study from Parity found that nearly half of Gen Z and Millennial sport watchers are more likely to purchase from a brand that sponsors a woman athlete (46%) or team (46%). Brands looking to engage younger audiences should lean into partnerships with women athletes, invest to drive growth, and put these women at the centre of their commercial strategies, campaigns and activations¹.

KEY GROWTH LEVERS

1

MAKE IT IMPOSSIBLE TO MISS WOMEN'S RUGBY

Visibility remains the biggest barrier to fan engagement – especially in women's rugby, where 32% of fans cite low visibility as a barrier to them engaging with women's rugby (vs 17% for men's).

The next wave of growth depends on making the sport easier to find and follow – through expanded broadcast deals, exposure on digital platforms, and more and easier to reach live experiences.

2

EMPOWER PLAYERS TO TELL THEIR STORIES

Women's rugby fans are more influenced by player visibility than men's (40% vs 33%).

In the US this rises to 43%, with fans saying increased visibility of players has boosted their engagement with the game.

Brands and platforms should focus on player-led content, helping athletes build their own profiles to inspire loyalty among younger, digital-first, and diverse audiences.

3

GIVE FANS EVEN MORE OPPORTUNITIES TO WATCH STARS OF THE GAME

International tournaments act as a springboard for domestic growth. They provide a global platform to showcase the sport and drive interest, but lasting growth depends on converting these spikes of interest into sustained year-round engagement.

To build connections and deepen passions of new fans, tentpole moments must be followed by storytelling, visibility and clear signposting into domestic competitions.

4

CONTINUE TO GROW THE PLAYING PATHWAYS

Women's rugby fans are more likely to have played rugby themselves (31% vs 25% of men's rugby fans), showing a stronger connection between playing and following the sport.

This is particularly true in North America, where many fans are current or former players.

A diverse competition structure – from schools to social play – grows the player base and builds passion from the ground up.

5

LEAN INTO FLUID FANDOM – AND UNDERSTAND HOW ITS DIFFERENT FROM TRADITIONAL ENGAGEMENT

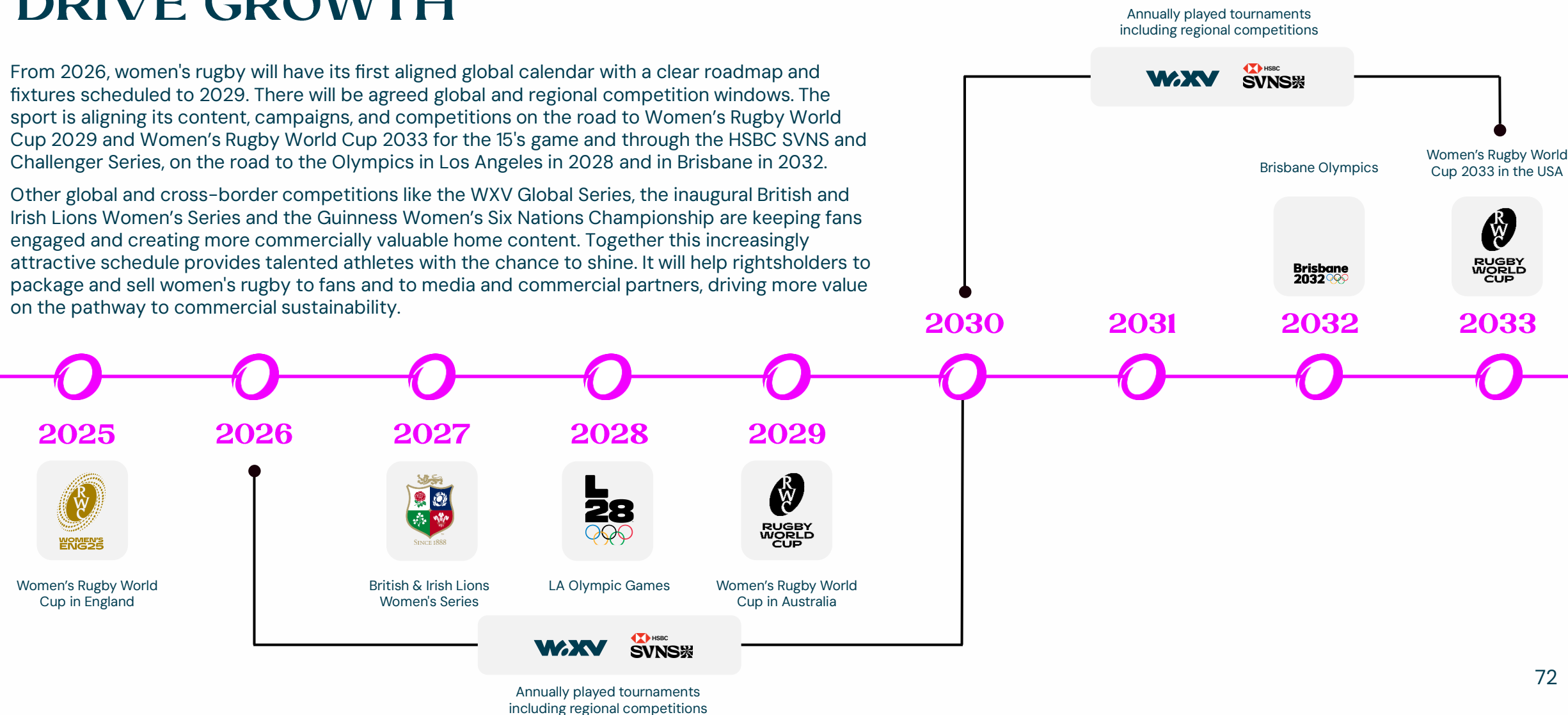
41% of women's rugby fans don't yet support a domestic club – revealing an open, curious fanbase with room to grow.

New international competitions are enhancing the global calendar, whilst domestic competitions are continuing to evolve. By co-operating, shaping, and tailoring the rugby product globally, and in domestic markets, rights holders and broadcasters can broaden access worldwide. Women's rugby can unlock new audiences, build loyalty, and future-proof its growth.

A CLEAR GLOBAL CALENDAR WILL DRIVE GROWTH

From 2026, women's rugby will have its first aligned global calendar with a clear roadmap and fixtures scheduled to 2029. There will be agreed global and regional competition windows. The sport is aligning its content, campaigns, and competitions on the road to Women's Rugby World Cup 2029 and Women's Rugby World Cup 2033 for the 15's game and through the HSBC SVNS and Challenger Series, on the road to the Olympics in Los Angeles in 2028 and in Brisbane in 2032.

Other global and cross-border competitions like the WXV Global Series, the inaugural British and Irish Lions Women's Series and the Guinness Women's Six Nations Championship are keeping fans engaged and creating more commercially valuable home content. Together this increasingly attractive schedule provides talented athletes with the chance to shine. It will help rightsholders to package and sell women's rugby to fans and to media and commercial partners, driving more value on the pathway to commercial sustainability.



IN CONCLUSION

The rapid rise of fandom in women's rugby is not just a cultural shift—it is a commercial opportunity that can define the future of the sport. This surge in global interest has opened the door to a more sustainable and inclusive future for rugby. Women's Rugby World Cup England 2025 will be a landmark tournament for the sport but realising this potential will require more than momentum – it demands collaboration, investment, and courage.

The global economy remains uncertain, and sports face ongoing financial pressures. For many, the temptation is to consolidate around what is established and profitable. But the evidence is clear: women's rugby is not a cost – it is an investment in the long-term growth and diversity of the game. Strategic funding and innovation is already yielding strong returns in fan loyalty and community engagement, and in time, we are confident its true commercial value will be realised.

This report shows the value that is building in women's rugby. There is more work to be done, but if we are to seize our opportunity, we must commit to sport and business models that treat women's rugby as a central, not secondary, pillar of the sport. Women's rugby can become a flagship for innovation and financial sustainability in global sport.



APPENDIX

06

This report includes data points from a range of sources:

World Rugby fan survey 2025

4,000

Respondents were surveyed about women's sport, women's rugby and men's rugby across Japan, South Africa, Australia, France, Canada, USA and UK



574



558



561



560



553



558



562

Audience Definitions

Rugby Fan:

A fan of Women's Rugby Union, Women's Sevens, Women's Wheelchair Rugby, Men's Rugby Union, Men's Sevens or Men's Wheelchair Rugby (N=3,515)

Women's Rugby Fan:

A fan of Women's Rugby Union, Women's Sevens or Women's Wheelchair Rugby (N=2,400)

Men's Rugby Fan:

A fan of Men's Rugby Union, Men's Sevens or Men's Wheelchair Rugby (N=3,370)

Women's Sports Fan:

A fan of all sports/just women's sports, excluding rugby (N=411).

World Rugby data & insights

Social Media Analysis (Domo):

- Content Type trends
- Analysis of top men's rugby content vs women's rugby content
- Year-over-Year (YoY) Comparisons

Attendance and Ticket Sales:

- RWC 2021 tournament reports
- RWC 2025 reports
- RWC 2023 tournament reports
- WXV tournament reports

Google Analytics:

- RWC web and app analysis
- RugbyPass Editorial analysis
- RugbyPassTV analysis

Publicly available data

We reviewed 40 global reports to identify the most relevant insights and trends, helping contextualise the current state and growth trajectory of women's rugby.

In addition, we analysed publicly accessible data on attendance, broadcast figures, and audience engagement for key women's rugby competitions such as the Guinness Women's Six Nations and Premiership Women's Rugby.

Finally, we examined social media followings of official accounts and players to better understand the digital footprint and fan interest surrounding the game.

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